ProjeQtOr User guide

Release 5.1

ProjeQtOr

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Contents

1 Features **3**
- 1.1 Planning management . . . 4
- 1.2 Resource management . . . 6
- 1.3 Tickets management . . . 7
- 1.4 Costs management . . . 8
- 1.5 Quality management . . . 9
- 1.6 Risks management . . . 10
- 1.7 Perimeter management . . . 11
- 1.8 Documents management . . . 12
- 1.9 Commitments management . . . 13
- 1.10 Tools . . . 14

2 Concepts **15**
- 2.1 ProjeQtOr roles . . . 16
- 2.2 Profiles definition . . . 18
- 2.3 Stakeholder definition . . . 20
- 2.4 Project affectation . . . 24
- 2.5 Activity assignment . . . 26
- 2.6 Resource function and cost . . . 27
- 2.7 Resource calendar . . . 28
- 2.8 Photo . . . 30

3 Graphical user interface **31**
- 3.1 Global view . . . 32
- 3.2 Alerts . . . 66
- 3.3 Themes . . . 68
- 3.4 Multilingual . . . 68
- 3.5 Keyboard functionality . . . 68
- 3.6 Common sections . . . 69
- 3.7 User parameters . . . 77

4 Planning elements **79**
- 4.1 Project . . . 81
- 4.2 Activity . . . 82
- 4.3 Milestone . . . 84
- 4.4 Common sections . . . 86

5 Real work allocation **95**

5.1 Real work allocation . . . 96

6 Follow-up **105**
6.1 Today . . . 106
6.2 Gantt chart . . . 113
6.3 Planning . . . 113
6.4 Projects portfolio . . . 114
6.5 Resource Planning . . . 115
6.6 Diary . . . 116
6.7 Reports . . . 118

7 Document management **121**
7.1 Documents . . . 122

8 Ticket management **129**
8.1 Tickets . . . 129
8.2 Tickets (simple) . . . 135
8.3 Multi-version selection . . . 136

9 Requirements et Tests **137**
9.1 Requirements . . . 137
9.2 Test cases . . . 141
9.3 Test sessions . . . 144
9.4 Summary of test cases section . . . 149

10 Financial **151**
10.1 Individual expense . . . 151
10.2 Project expense . . . 153
10.3 Expense detail lines . . . 155
10.4 Quotations . . . 157
10.5 Orders . . . 159
10.6 Bills . . . 161
10.7 Terms . . . 169
10.8 Activities prices . . . 171
10.9 Payments . . . 172

11 Risk & Issue Management **173**
11.1 Risks . . . 173
11.2 Opportunities . . . 175
11.3 Criticality value calculation . . . 177
11.4 Issues . . . 178
11.5 Actions . . . 179

12 Review logs **181**
12.1 Meetings . . . 181
12.2 Periodic meetings . . . 184
12.3 Attendees section . . . 186
12.4 Progress section . . . 186
12.5 Decisions . . . 187
12.6 Questions . . . 188

13 Environmental parameters **191**
13.1 Products . . . 191
13.2 Versions . . . 193
13.3 Affectations . . . 195

13.4 Users . . . 196
13.5 Resources . . . 199
13.6 Teams . . . 203
13.7 Calendar . . . 204
13.8 Customers . . . 206
13.9 Contacts . . . 207
13.10 Recipients . . . 209
13.11 Contexts . . . 210
13.12 Document directories . . . 211

14 Tools **213**
14.1 Emails sent . . . 213
14.2 Alerts . . . 214
14.3 Messages . . . 215
14.4 Import data . . . 216
14.5 Automatic import . . . 219

15 Controls & Automation **221**
15.1 Workflows . . . 221
15.2 Mails on event . . . 224
15.3 Delays for tickets . . . 225
15.4 Indicators . . . 226
15.5 Predefined notes . . . 227
15.6 Checklists . . . 228
15.7 Receivers list . . . 230

16 Access rights **231**
16.1 Profiles . . . 231
16.2 Access modes . . . 234
16.3 Access to forms . . . 235
16.4 Access to reports . . . 235
16.5 Access to data (project dependant) . . . 236
16.6 Access to data (not project dependant) . . . 236
16.7 Specific access . . . 237
16.8 Translatable name . . . 239

17 Lists of values **241**
17.1 Functions . . . 242
17.2 Status . . . 243
17.3 Quality levels . . . 244
17.4 Health status . . . 244
17.5 Overall progress . . . 245
17.6 Trends . . . 245
17.7 Likelihoods . . . 246
17.8 Criticalities . . . 246
17.9 Severities . . . 247
17.10 Urgencies . . . 247
17.11 Priorities . . . 248
17.12 Risk levels . . . 248
17.13 Feasibilities . . . 249
17.14 Efficiencies . . . 249
17.15 Payment deadlines . . . 250
17.16 Payment methods . . . 250
17.17 Delivery modes . . . 251
17.18 Measure units . . . 251

18 Lists of types **253**
18.1 Projects types . . . 255
18.2 Tickets types . . . 256
18.3 Activities types . . . 256
18.4 Milestones types . . . 257
18.5 Quotations types . . . 257
18.6 Orders types . . . 258
18.7 Individual expenses types . . . 258
18.8 Project expenses types . . . 259
18.9 Expenses details types . . . 260
18.10 Bills types . . . 261
18.11 Payments types . . . 261
18.12 Risks types . . . 262
18.13 Opportunities types . . . 262
18.14 Actions types . . . 263
18.15 Issues types . . . 263
18.16 Meetings types . . . 264
18.17 Decisions types . . . 264
18.18 Questions types . . . 265
18.19 Messages types . . . 265
18.20 Documents types . . . 266
18.21 Contexts types . . . 266
18.22 Requirements types . . . 267
18.23 Test cases types . . . 267
18.24 Test sessions types . . . 268
18.25 Customers types . . . 268
18.26 Behavior section . . . 269

19 Plug-ins **271**
19.1 Plug-ins management . . . 271

20 Administration **273**
20.1 Administration console . . . 273
20.2 Audit connections . . . 274
20.3 Global parameters . . . 275

21 Glossary **281**
21.1 Glossary . . . 281

ProjeQtOr is a Quality based Project Organizer, as a web application.

ProjeQtOr focuses on IT Projects, but is also compatible with all kinds of Projects.

Its purpose is to propose a unique tool to gather all the information about the projects.

The fact is that many Project Management softwares just focus on planning. But it is a much too restrictive point of view. Of course, planning is an important activity of Project Management and is one of the keys to Project success, but it is not the only one.

Project Managers need to foresee all what can happen, measure risks, build an action plan and mitigation plan.

It is also important to track and keep traces of all what is happening to the Project : incidents, bugs , change requests, support requests, ...

In this objective, ProjeQtOr gives visibility at all levels of Project Management.

At lower level, the Project follow-up consists in gathering all information, and maintain it up to date. This involves all the operational teams.

At upper level, Project Steering uses the follow-up data to take the decisions and build the action plan. This allows to bring the adjustments needed to target on the objectives of the project.

The goal of ProjeQtOr is to be Project Management Method independent. Whatever your choice of the method, you can use ProjeQtOr.

CHAPTER 1

Features

ProjeQtOr is a “Quality based Project Organizer”.

It is particularly well suited to IT projects, but can manage any type of project.

It offers all the features needed to different Project Management actors under a unique collaborative interface.

Features

- *Planning management*
- *Resource management*
- *Tickets management*
- *Costs management*
- *Quality management*
- *Risks management*
- *Perimeter management*
- *Documents management*
- *Commitments management*
- *Tools*

1.1 Planning management

ProjeQtOr provides all the elements needed to build a planning from workload, constraints between tasks and resources availability.

Project

The project is the main element of ProjeQtOr.

It is also the highest level of visibility and definition of access rights based on profiles.

You can define profiles , some have visibility on all projects, others only on the projects they are assigned to.

You can also define sub-projects of a project and sub-project of sub-projects without limit to this hierarchical organization.

This allows for example to define projects that are not real projects , but just a definition of the structure for your organization.

Activity

An activity is a task that must be planned, or includes other activities.

This is usually a task that has a certain duration and should be assigned to one or more resources.

Activities appear on the Gantt Planning view.

Milestone

A milestone is an event or a key date of the project.

Milestones are commonly used to track delivery dates or force a start date of activity.

They can also be used to highlight the transition from one phase to the next one.

Unlike activities , milestones have no duration and no work.

Resources

Resources can be assigned to activities.

This means that some work is defined on this activity for the resource.

Only the resources affected to the project of the activity can be assigned to the activity.

Real work allocation

Resources enter their time spent on the Real work allocation screen.

This allows for a real-time monitoring of work.

Moreover, updating the left work allows to recalculate the planning taking into account the actual progress on each task.

Planning

The planning is based on all the constraints defined:

- left work on each activity
- availability of resources
- rate of resource affectation to projects and assignment rate of resources to activities
- planning mode for each activity (as soon as possible, fixed duration, ...)
- dependencies between activities
- priorities of activities and projects

The planning is displayed as a Gantt chart.

Project Portfolio

The planning can also be viewed as a Project Portfolio, which is a Gantt planning view restricted to one line per project, plus optionally selected milestones.

1.2 Resource management

ProjeQtOr manages the availability of resources that can be affected to multiple projects. Tool calculates a reliable, optimized and realistic planning.

Resources

Resources are the persons working on the project activities.

A resource can also be a group of persons (team) for which you do not want to manage individual detail.

You can manage this through the capacity of the resource, that can be greater than 1 (for a group of people) or less than 1 (for a person working part-time).

Affectations

The first step is to affect each resource to the projects on which it has to work, specifying the affectation rate (% of maximum weekly time spent on this project).

Assignments

Then you can assign resources to project activities.

This means that some work is defined on this activity for the resource.

Only the resources affected to the project of the activity can be assigned to the activity.

Calendars

To manage off days, you have a global calendar.

This calendar can be split into multiple calendars, to manage distinct availability types :

- you can create a calendar "80% " with every Wednesday as off day
- you can manage distinct holidays when working with international teams.

Each resource is then assigned to a calendar.

Real work allocation

Resources enter their time spent on the Real work allocation screen. This allows for a real-time monitoring of work.

Moreover, updating the left work allows to recalculate the planning taking into account the actual progress on each task.

1.3 Tickets management

ProjeQtOr includes a Bug Tracker to monitor incidents on your projects, with possibility to include work on planned tasks of your projects.

Ticket

A Ticket is any intervention not needing to be planned (or that cannot be planned).

It is generally a short activity for which you want to follow advancement to describe (and possibly provide) a result.

For example, bugs or problems can be managed through Tickets:

- You can not schedule the bugs before they are identified and registered
- You must be able to give a solution to a bug (workaround or fix).

Simple tickets

Simple tickets are just simplified representations of Tickets for users that will "create" tickets but not "treat" them.

Elements created as simple tickets are also visible as Tickets, and vice versa.

1.4 Costs management

All elements related to delays can also be followed as costs (from resources work) and managing other expenses all costs of the project are monitored and can generate invoices.

Projects

The Project is the main entity of ProjeQtOr. In addition to tracking work on projects, ProjeQtOr can track the costs associated with this work.

Activities

An Activity is a task that must be planned, or includes other activities. Work assigned to resources on activities is converted into associated costs.

Resource cost

To calculate the cost of expenses ProjeQtOr defines the Resources cost. This cost may vary depending on the role of the resource and may change over time.

Project expenses

Projects expenses can also record expenses not related to resource costs (purchase , lease, sub-contracting).

Individual expenses

Individual expenses can record expenses generated by a given resource.

Quote, Orders, Term, Bill

ProjeQtOr can manage various financial elements found on a project: Quotation (proposals), Orders (received from customers), the invoicing Terms and Bills.

1.5 Quality management

The specificity of ProjeQtOr is that it is Quality Oriented : it integrates the best practices that can help you meet the quality requirements on your projects.

This way, the approval stage of your Quality Systems are eased, whatever the reference (ISO, CMMI, ...).

Workflows

Workflows are defined to monitor changes of possible status.

This allows, among other things, to restrict certain profiles from changing some status.

You can, for instance, limit the change to a validation status to a given profile, to ensure that only an authorized user will perform this validation.

Delays for tickets

You can define Delays for ticket. This will automatically calculate the due date of the Ticket when creating the Ticket.

Indicators

Indicators can be calculated relative to respect of expected work, end date or cost values.

Some indicators are configured by default , and you can configure your own depending on your needs.

Alerts

Non respect of indicators (or the approach of non-respect target) can generate Alerts.

Checklists

It is possible to define custom Checklists that will allow, for instance, to ensure that a process is applied.

Reports

Many Reports are available to track activity on projects, some displayed as graphs.

All is traced

Finally, thanks to ProjeQtOr , everything is traced.

You can follow-up, in a centralized and collaborative way, the various elements you used to follow-up (or not) in many Excel sheets : list of Questions & Answers, recording Decisions impacting the project, management of documents configuration, follow-up of meetings ...

In addition, all updates are tracked on each item to keep (and display) an history of the life of the item.

1.6 Risks management

ProjeQtOr includes a comprehensive risks and opportunities management, including the action plan necessary to mitigate or treat them and monitoring occurring problems.

Risks

A Risk is a threat or event that could have a negative impact on the project, which can be neutralized, or at least minimize, by predefined actions.

The risk management plan is a key point of the project management. Its objective is to :

- identify hazards and measure their impact on the project and their probability of occurrence,
- identify avoidance measures (contingency) and mitigation in case of occurrence (mitigation),
- identify opportunities,
- monitor the actions of risks contingency and mitigation,
- identify risks that eventually do happen (so they become issues).

Opportunities

An Opportunity can be seen as a positive risk. This is not a threat but an opportunity to have a positive impact on the project.

They must be identified and followed-up not to be missed out.

Issues

Issue is a risk that happens during the project.

If the risk management plan has been properly managed, the issue should be an identified and qualified risk.

Actions

Actions shall be defined to avoid risks, not miss the opportunities and solve issues.

It is also appropriate to provide mitigation actions for identified risks that did not occur yet.

1.7 Perimeter management

ProjeQtOr allows you to monitor and record all events on your projects and helps you in managing of deviations, to control the perimeter of projects.

Meetings

Follow-up and organize Meetings, track associated action plans, decisions and easily find this information afterwards.

Periodic meetings

You can also create Periodic meetings, which are regularly recurring meetings (steering committees, weekly progress meetings, ...)

Decisions

Decisions follow-up allows you to easily retrieve the information about the origin of a decision :

- who has taken a particular decision ?
- when?
- during which meeting ?
- who was present at this meeting?

Not revolutionary, this feature can save you many hours of research in case of dispute .

Questions

Tracking Questions / Answers can also simplify your life on such exchanges, which often end up as a game of Ping - Pong with a poor Excel sheet in the role of the ball (when it is not a simple email exchange...).

Product and Version

ProjeQtOr includes Product management and Product Versions.

Each version can be connected to one or more projects.

This allows you to link your activities to target version.

This also allows to know, in the case of Bug Tracking, the version on which a problem is identified and the version on which it is (or will be) fixed.

1.8 Documents management

ProjeQtOr offers integrated **Document Management**.

This tool is simple and efficient to manage your project and product documents.

ProjeQtOr supported only digital document. Document file will be stored in the tool as versions.

Document can be versioning and an approver process can be defined.

Directories structure management

- Allows to define a structure for document storage.
- Directories structure is defined in *Document directories* screen.

Document management

- *Documents* screen allows to manage documents.

Document access

- Global definition of directories is directly displayed in the document menu, to give direct access to documents depending on the defined structure.
- See: *«Menu» and «Documents» windows*.

1.9 Commitments management

ProjeQtOr allows you to follow the requirements on your projects and measure at any time coverage progress, making it easy to reach your commitments.

In addition to the standard functionalities to manage your projects and monitor costs and delays, ProjeQtOr provides elements to monitor commitments on products.

By linking these three elements, you can obtain a requirements covering matrix, simply, efficiently and in real time.

Requirements

Requirements management helps in describing requirements explicitly and quantitatively monitor progress in building a product.

Test cases

The definition of Test cases is used to describe how you will test that a given requirement is met.

Test sessions

Test sessions group test cases to be executed for a particular purpose.

1.10 Tools

ProjeQtOr includes some tools to generate alerts, automatically send emails on chosen events, import or export data in various formats.

Imports

ProjeQtOr includes an import feature for almost all elements of project management, from CSV or XLSX files.

CSV and PDF exports

All lists of items can be printed and exported to CSV and PDF format.

The details of each item can be printed or exported in PDF format.

MS-Project export

The Gantt planning can be exported to MS-Project format (XML).

Alerts

Internal alerts can be generated automatically based on defined events.

Emails

These alerts can also be dispatched as emails.

It is also possible to manually send emails from the application, attaching the details of an item.

It is also possible to retrieve answers to this type of email to save the message in the notes of the relevant item.

Administration

ProjeQtOr provides administrative features to manage connections, send special alerts and manage background tasks treatments.

CRON

Moreover, the tool features its own CRON system, independent of the operating system and able to handle the PHP stop and restart.

CHAPTER 2

Concepts

This chapter defines the concepts of ProjeQtOr.

They can be referred in the following chapters.

2.1 ProjeQtOr roles

A stakeholder can play many roles in ProjeQtOr.

Roles depends on *Stakeholder definition*.

Specific roles are defined to allow:

- To categorize the stakeholders involved in the projects.
- To identify the stakeholders on items.
- To regroup the stakeholders to facilitate information broadcasting.

Use to

- In items of elements.
- As reports parameters.
- As recipients list to mailing and alert.

Administrator

- An administrator is a *user* with "Administrator" profile.
- Has a visibility over all the projects.

Contact

- A contact is a person in a business relationship.
- A contact can be a person in the customer organization.
- Used as contact person for contracts, sales and billing.
- Contacts management is performed on *Contacts* screen.

Issuer

- An issuer is a *user* who created the item.

See also:

Creation information

- The issuer name and creation date of an item are displayed in the *Creation information zone*.

Project leader

- A project leader is a *resource* affected to a project with a "Project Leader" profile.

Project manager

- A project manager is a *resource* defined as the manager on a project.

See also:

Accelerator button

- This button allows to set current user is the project manager.
- More detail, see: *Assign to me button*.

Project team

- All *resources* affected to a project.

Requestor

- A requestor is a *contact*.
- Used to specify the requestor for ticket, activity and requirement.
- Only contacts affected to the selected project can be a requestor.

Responsible

- A responsible is a *resource* in charge of item treatment.
- Usually, the responsible is set when the status of the item is *handled*.
- Only resources affected to the selected project can be a responsible.

See also:

GUI behavior

- It is possible to define that responsible field is mandatory on handled status.
- The element type screens allow to set this parameter to several elements.
- More detail, see: *Behavior section*.

See also:

Set automatically the responsible

- It is possible to set automatically the responsible.
- More detail, see: *Global parameters*.

See also:

Accelerator button

- This button allows to set current user is the responsible.
- More detail, see: *Assign to me button*.

See also:

Access rights

- It is possible to define a combination of rights to permit access for elements the user is responsible for.
- More detail, see: *Access modes* screen.

Resource

- Human or material resource involved in the projects.
- It is possible to define the resource availability to the projects.
- Resources management is performed on the *Resources* screen.

User

- User allows to connect to the application.
- User profile define general access rights. But it does not necessarily give access to project data.
- Users management is performed on the *Users* screen.

2.2 Profiles definition

The profile is a group used to define application authorization and access rights to the data.

A user linked to a profile belongs to this group who share same application behavior.

Note:

- You can define profiles to be conformed to the roles defined in your organization.
- Access rights management is done on *Access rights* screens

---

Used for

- The profile is used to define access rights to application and data, first.
- Also, the profile is used to send message, email and alert to groups.

Selected profile in project affectation

- A profile can be selected to a user, resource or contact in project affectation.
- The profile selected is used to give data access to elements of the projects.

Workflow definition

- The profile is used to define who can change from one status to another one.
- You can restrict or allow the state transition to another one according to the profile.
- Workflow definition is managed in *Workflows* screen.

Predefined profiles

- ProjeQtOr offer some predefined profiles.

  Administrator profile

  - This profile group all administrator users.
  - Only these users can manage the application and see all data without restriction.
  - The user “admin” is already defined.

  Supervisor profile

  - Users linked to this profile have a visibility over all the projects.
  - This profile allows to monitor projects.

  Project leader profile

  - Users of this profile are the project leaders.
  - The project leader has a complete access to owns projects.

  Project member profile

  - A project member is working on projects affected to it.
  - The user linked to this profile is a member of team projects.

  Project guest profile

  - Users linked to this profile have limited visibility to projects affected to them.
  - The user “guest” is already defined.

Predefined profiles (External)

- ProjeQtOr allow to involve client employees in their projects.
- The distinction between this profile and its equivalent, user access is more limited.

2.3 Stakeholder definition

ProjeQtOr allows to define roles of stakeholders.

The stakeholder definition is made with profile and a combination with user/resource/contact definition.

The combinations user/resource/contact allow to define:

- Connection to the application or not.
- Data visibility.
- Resource availability.
- Contact roles.

The next matrix shows the different possibilities.

	Connection	Visibility	Availability
URC	✔	✔	✔
UR	✔	✔	✔
UC	✔	✔	✘
U	✔	✔	✘
R	✘	✘	✔

Row legend

- U = User, R = Resource, C = Contact

Data visibility

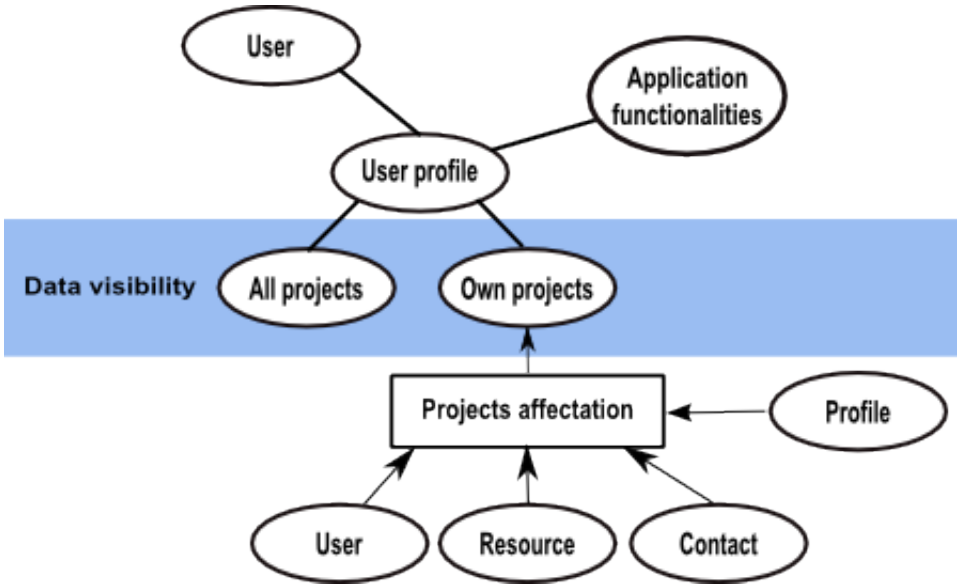

Fig. 2.1: Data visibility diagram

User profile

- To a user, data visibility is based on its user profile.
- User profile defined general access to application functionalities and data.
- Base access rights defined if a user has access to own projects or over all projects.

All projects

- This access right is typically reserved for administrators and supervisors.
- Users have access to all elements of all projects.

Own projects

- Users with this access right must be affected to project to get data visibility.
- Selected profile in affectation allows to define access rights on project elements.
- For more detail, see: *Project affectation*.

Resource availability

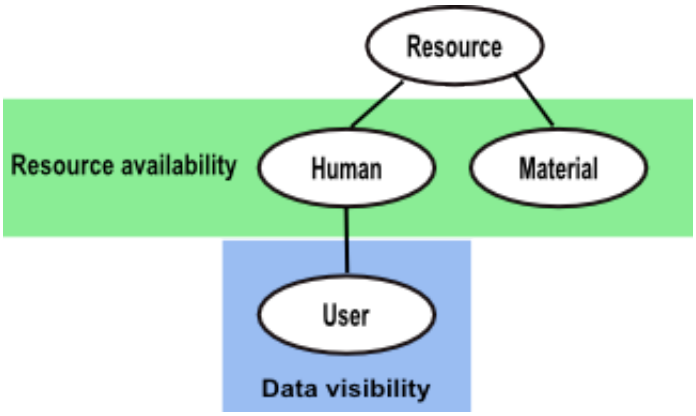

Fig. 2.2: Resource availability diagram

- Only resource can be assigned to project activities.
- Project affectation allows to define the resource availability on project.

  Human resource

  - Human resource is a project member.
  - Combined with a user, a human resource can connect to the application.

  Material resource

  - Material resources availability can be defined on projects
  - But, material resource must not be connected to the application.

Contact roles

- ProjeQtOr allows to involve contacts in projects.
- Combined with a user, a contact can connect to the application
- Combined with a resource, contact availability can be planned in projects.

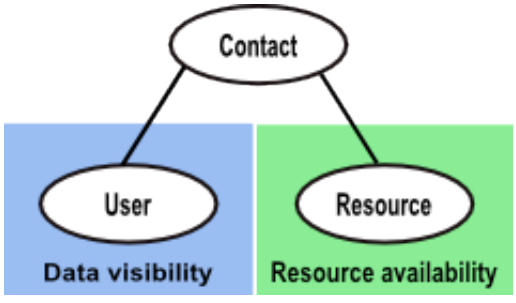

Fig. 2.3: Contact roles diagram

2.3.1 Shared data

For a stakeholder, data on user, resource and contact are shared.

Project affection and user profile are also shared.

Note:

- For a stakeholder, you can define and redefine the combination without losing data.

2.4 Project affectation

Project affectation is used to:

- Defines project data visibility.
- Defines resource availability.
- Defines the period of access to project data by the user.

Note:

- The *Affectations* screen allows to manage overall project affectations.

The following sections describe project affectation, performed for user, resource or contact.

2.4.1 User affectation

Project affectation gives data visibility on a project.

Project affectation can be defined in the *Users* screen.

Profile selection

- Selected profile allows to define access rights on project elements.

Hint:

- Selected profile allows to define the role played by the user in a project.
- For instance, the user might be a project manager in a project and it could be a project member in another.

Note:

- Profile defined in project affectation does not grant or revoke access to users.
- General access to application functionalities and data is defined by user profile.

Period selection

- Allow to define the period of project data visibility.

  Hint:

  – Can be used to limit access period, according to services agreement.

2.4.2 Resource affectation

Project affectation allows to define the resource availability on project.

A resource may be affected to projects at a specified rate for a period.

Project affectation can be defined in *Project* and *Resources* screens.

It is also possible to affect a team to a project in *Teams* screens.

Note:

- A resource affected to a project can be defined as *responsible* of project items treatment.

Period & Rate selection

- A resource may be affected to a project at a specified rate for a period.

Note:

- If the period is not specified then the resource is affected throughout the project.

Attention:

- Activities planning process trying to plan the assigned work to the resource within the specified period.
- If a incompletely planned tasks happen a brown bar appear in the Gantt view.

Multi-project affectation

A resource can be affected to multiple projects in the same period.

Make sure that the affectation to projects for a period not exceeding 100%.

In the section **Affectations** in *Resources* screen, a tool allows to displayed conflicts.

Hint: How resolve conflicts?

- You can change affectation period to avoid overlap between projects.
- You can change the rate of affectation for it does not exceed 100% for the period.

2.4.3 Contact affectation

A contact affected to a project can be defined as *requestor*.

Project affectation can be defined in *Project* and *Contacts* screens.

2.5 Activity assignment

- Activity assignment is used to assign resource to project activities.
- Project activities are activity, meeting and test session.

Note:

- Only resources affected to the project of the activity can be assigned to the activity.

2.6 Resource function and cost

Function

- The function defines the generic competency of a resource.
- It is used to define the role play by the resource on specific activity.
- In real work allocation screen, the function name will be displayed in the real work entry in this activity.
- You can specify a function in field **main function** or in resource cost definition.
- You can manage function list in *Functions* screen.

Main function

- A main function can be defined in a resource.
- Allows to define a default function to a resource.

Resource cost definition

- Allows to define for a resource the **daily cost** for a **specific period of time**, for a **specific function**.
- Allows to define distinct cost for different resource function.

  Example
  - A resource can work in a different function in a different department from the same company.

- Allows to define distinct cost to the same function but for different period of time.

  Example
  - You can set the salary increase of the resource (cost) for the next period.

Real cost calculation

- When real work is entered, the real cost is calculated with work of the day and daily cost for this period.

Planned cost calculation

- When the project planning is calculated, resource cost is used to calculate planned cost.
- Planned cost is calculated with planned work of the day and daily cost for this period.

Note:
- Function and cost are defined in *Resources* screen.

2.7 Resource calendar

A calendar defines the working days in a the year.

A calendar is defined for each resource.

Used for

Planning process

- Calendars ares used in planning process whose dispatches work on every working day.
- During the planning process, the assigned work to a resource is planned in its working days.

Note:

- You must re-calculate an existing planning to take into account changes on the calendar.

Shows the availability of resources

- Working days defined in a calendar allows to show availability of resources.

Default calendar

- The default calendar is used to define the working days in the year.
- By default, this calendar is defined for all resources.

Specific calendar

- A specific calendar can be created to define days off and work to a resource.

Note:

- A calendar is set in *Resources* screen.
- The calendar can be defined in *Calendar* screen.

Use case

Public holiday

- You can use the default calendar to set public holidays.

Personal calendar

- You can create a calendar to a resource.
- This calendar will indicate the personal days off and vacations.

Work schedule

- You can define a different work schedule to some resources.
- This calendar defined exceptions to normal working days.

2.8 Photo

A photo can be defined for a user, a resource and a contact.

It is a visual identification associated with the name.

Note:

- To enlarge, move the cursor over the picture.

Photo management

- Click on or photo frame to add an image file. To complete instruction see: *Attachment file*.
- Click on to remove the image.
- Click on image to display the photo.

Note:

- Photo management can be done in *User parameters*, *Users*, *Resources* , *Contacts* screens.

CHAPTER 3

Graphical user interface

ProjeQtOr provides a very rich user interface.

It may be frightening at first glance because of the very numerous elements it provides, but once you'll get familiar to the structure of the interface you'll discover that it is quite simple as all screens have the same frames and sections always have simular structure and position.

3.1 Global view

ProjeQtOr interface is divided into several areas.

Those areas are :

- *Top bar* 1
- *Logo area* 2
- *«Menu» and «Documents» windows* 3
- *«External shortcuts» and «Console messages» windows* 4
- *List window* 5
- *Detail window* 6
- *Info bar* 7

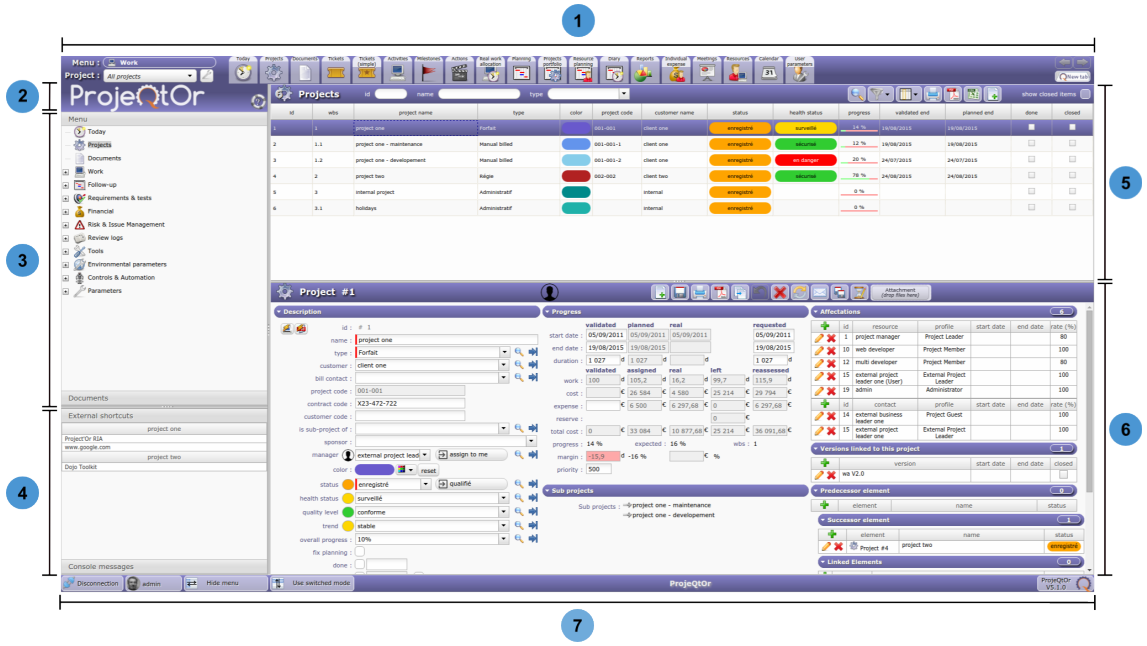

Fig. 3.1: Global view

Area separation

- The splitters allow resizing areas in the interface.
- The green splitter allows to resize the areas **«Menu and Documents window» and «Message and Link window»**.
- The red splitter allows to resize the areas left and right.
- The orange splitter allows to resize the areas **«List window» and «Detail window»**.

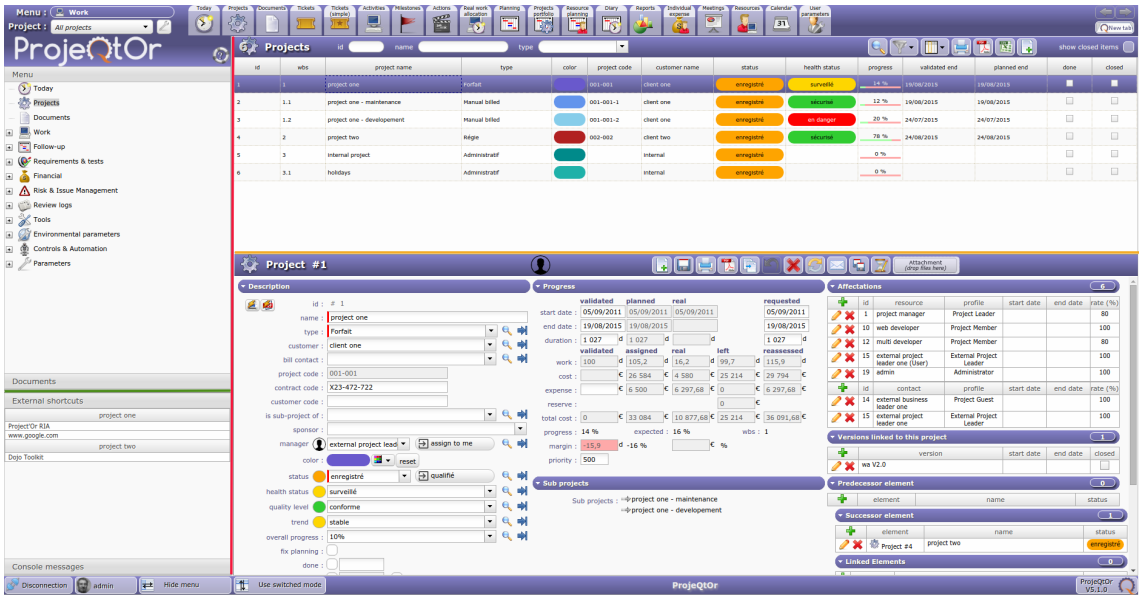

Fig. 3.2: Area separation

3.1.1 Top bar

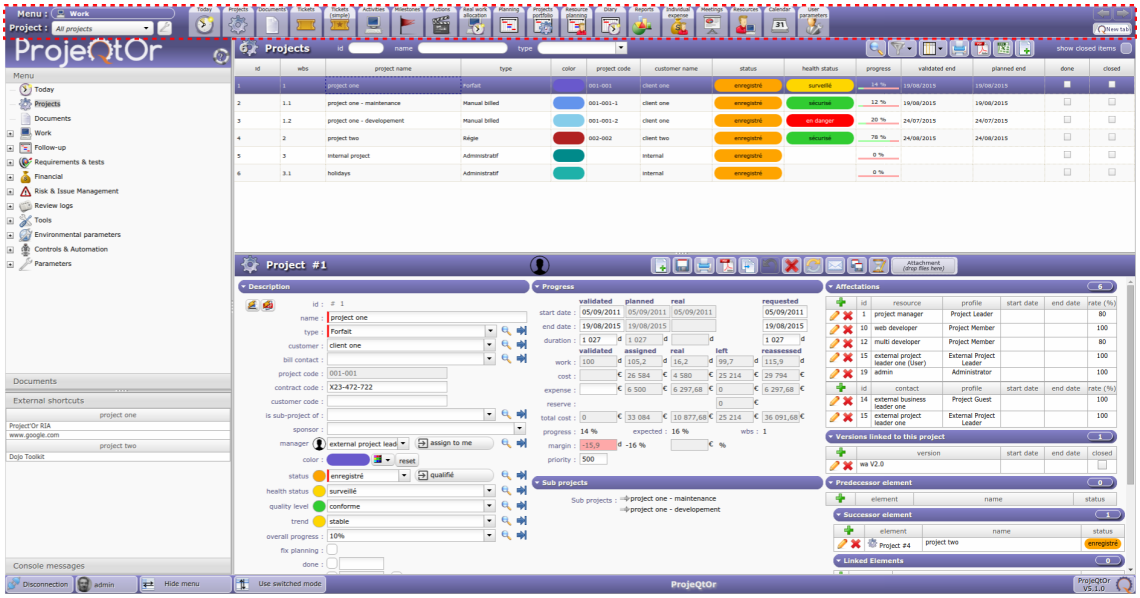

Fig. 3.3: Top bar

Menu buttons

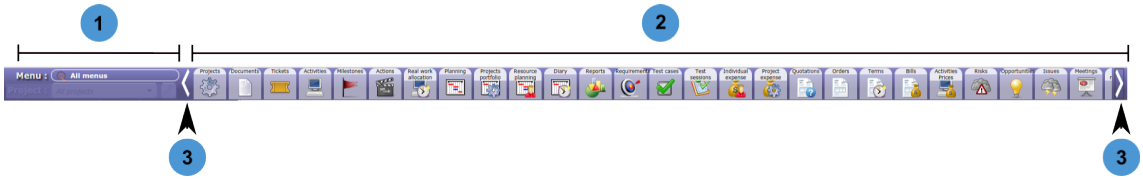

Fig. 3.4: Menu buttons zone

- The menu buttons (2) give rapid access to main elements.
- The arrows (3) allow to scroll buttons list.

  Contextual menu buttons (1)

  - Allows to select a work context to limit the displayed buttons.

Project selector

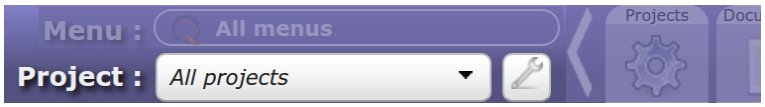

Fig. 3.5: Project selector zone

- Allows restricting the visibility of all objects of the dedicated project, including sub-projects if any.
- The selection will also define the "default" project for new items.

  Project selector parameters

  - Click on to display the project selector parameters dialog box, you can select :
    - View closed projects.
    - Change the project selector format.
    - Refresh the list.

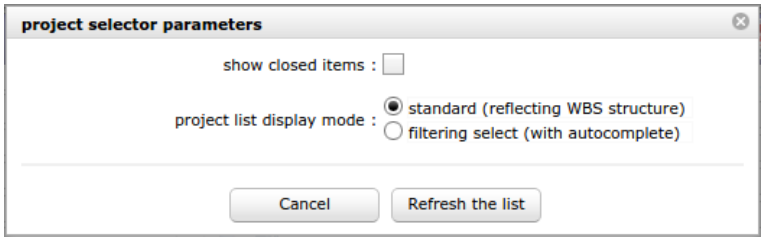

Fig. 3.6: Project selector parameters dialog box

Navigation buttons

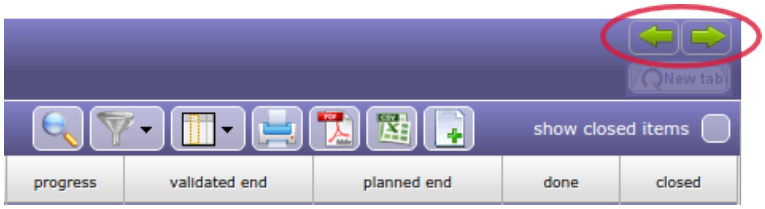

Fig. 3.7: Navigation buttons zone

- The navigation buttons give access to previous and next items in the history.

Button «New tab»

- Allows to open a new tab within the same session.

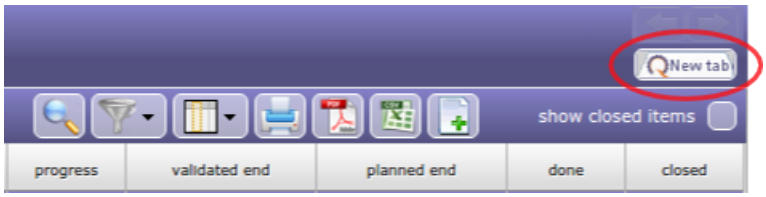

Fig. 3.8: Button «New tab» zone

3.1.2 Logo area

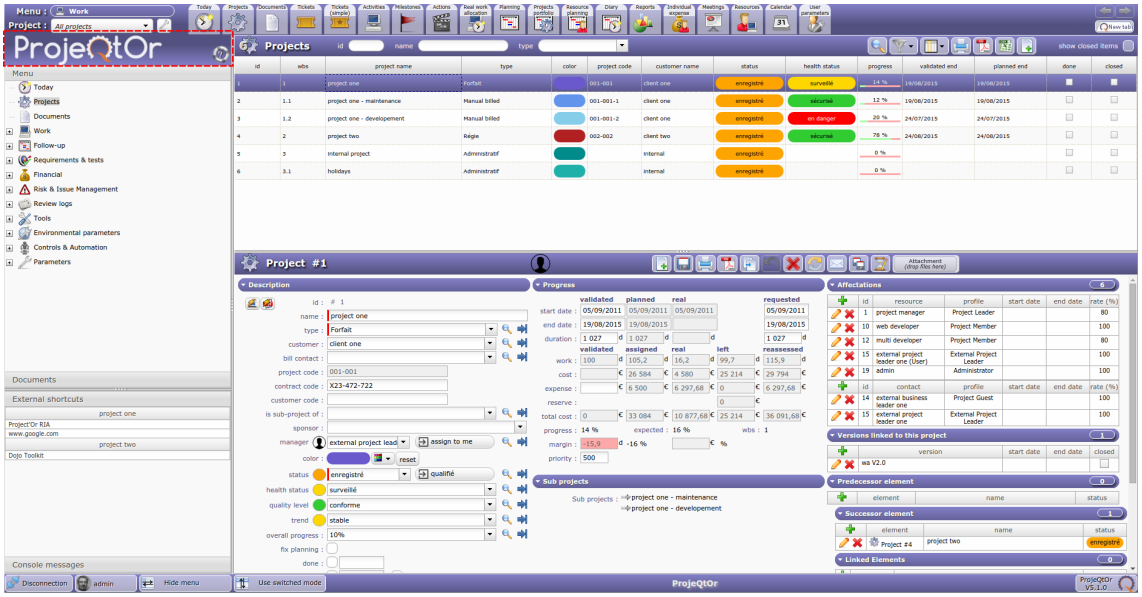

Fig. 3.9: Logo area

Information about the software

- Click on «Logo Area» will display the software information box.

Fig. 3.10: Software information box

Online user manual

- Click on or use shortcut key `F1` will open the online user manual, to the page corresponding to the current screen.

Note:

- You can change logo with your own.
- Refer to administration guide to replace the logo.

3.1.3 «Menu» and «Documents» windows

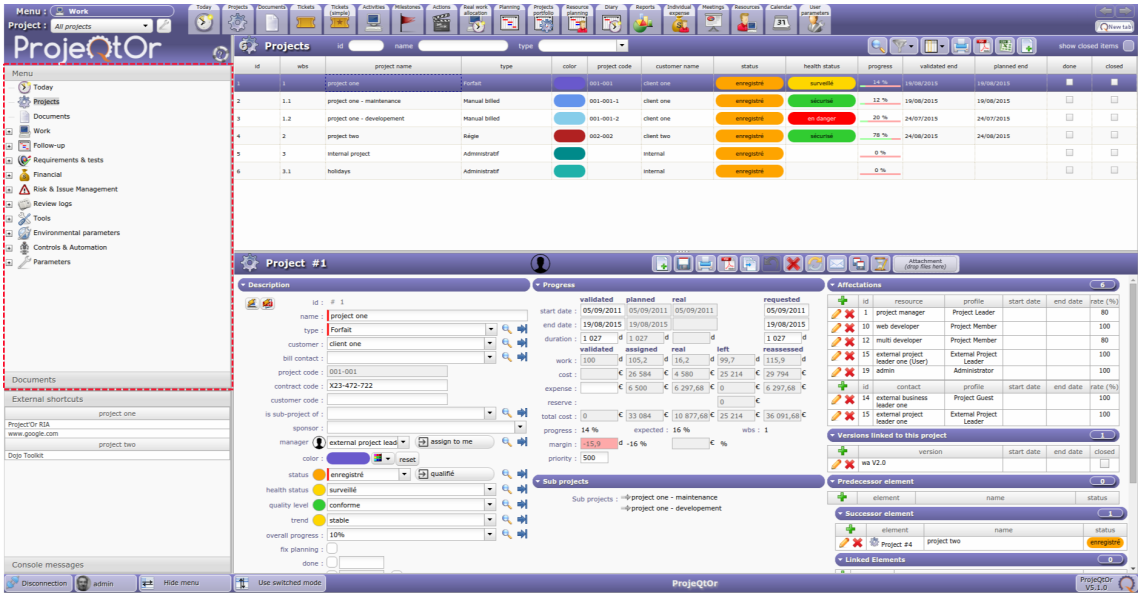

Fig. 3.11: «Menu» and «Documents» windows

Note: Toggling between windows

- To toggling between windows, just click on window header.

Menu window

- The menu is proposed as a tree view of reachable items.
- The items presented will depend on the access rights of user to the screens.
- Click on a grouping line will expand-shrink the group.
- Click on an item will display the corresponding screen in the main area (right side of the screen).

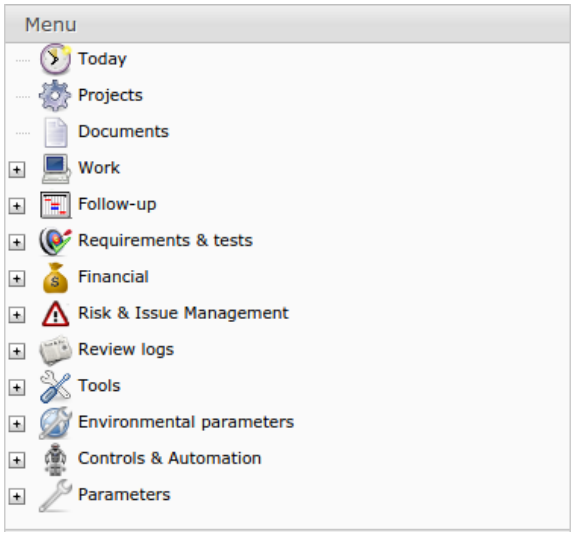

Fig. 3.12: Menu window

Note: User parameter "Icon size in menu"

- This parameter defines the size of icons in the menu.

Documents window

- Document directories give direct access to documents contained in the directory.

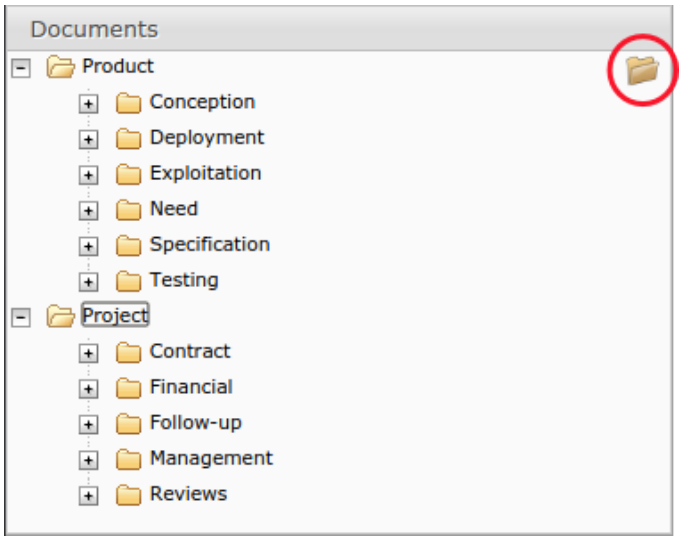

Fig. 3.13: Documents window

Document directories

This icon gives direct access to the *Document directories* screen.

3.1.4 «External shortcuts» and «Console messages» windows

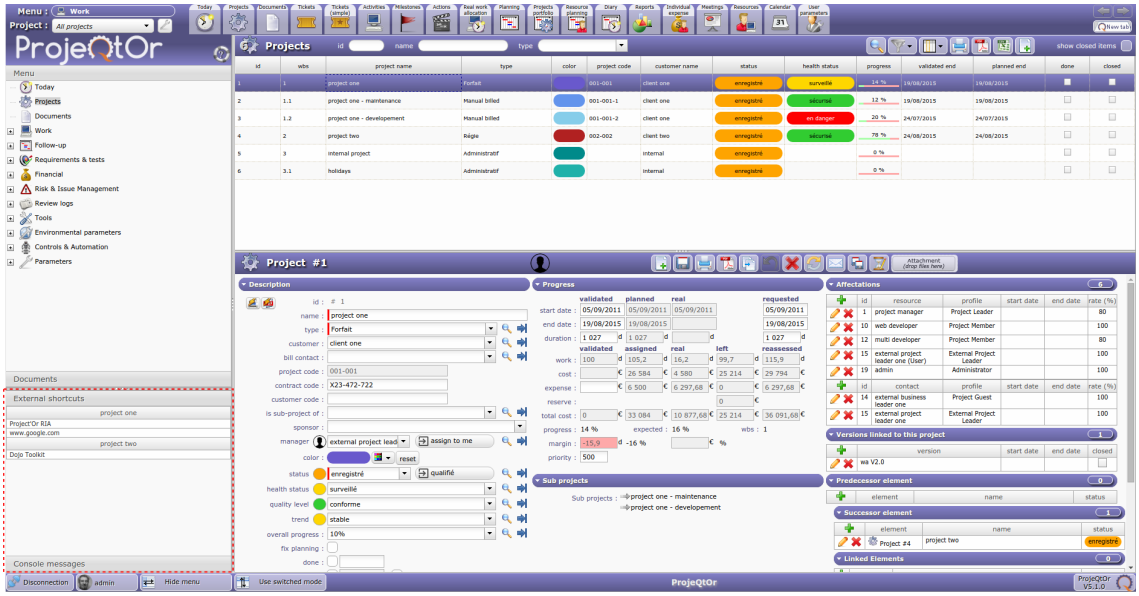

Fig. 3.14: «External shortcuts» and «Console messages» windows

Note: Toggling between windows

- To toggling between windows, just click on window header.

External shortcuts window

- Display hyperlinks to remote web pages.
- These links are defined as hyperlink attachments on projects.
- Links displayed here depend on the selected project.

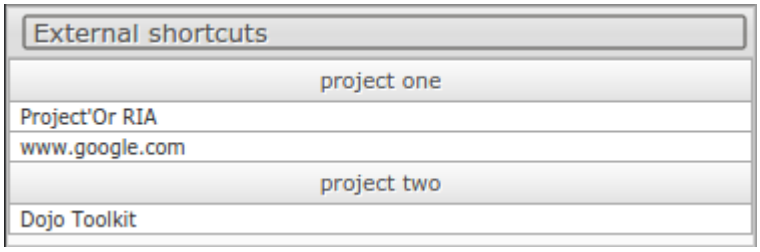

Fig. 3.15: External shortcuts window

Console messages window

- Displays information about main actions: insert, update, delete.
- The timestamp indicates when the action was done.

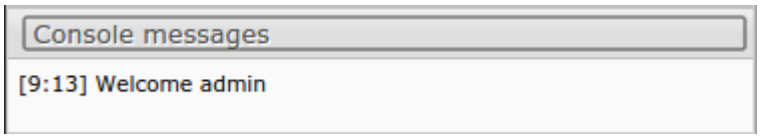

Fig. 3.16: Console messages window

Note:

- Messages displayed here are not stored and will be flushed when user logout.

3.1.5 List window

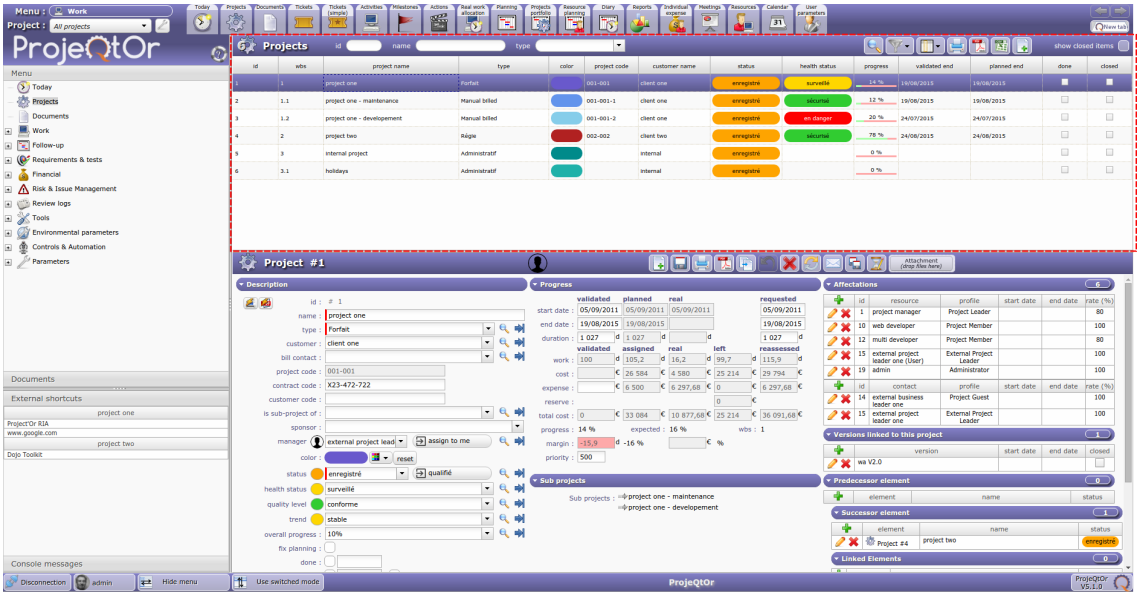

Fig. 3.17: List window

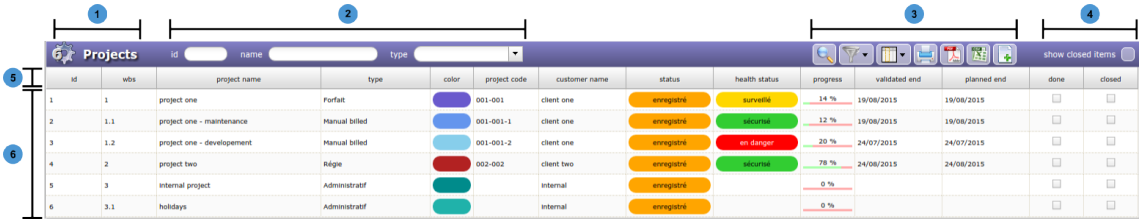

Fig. 3.18: List window zone

1 - Element identifier

- Displays the element name and the count of items in the list.
- Each element is identified with a distinctive icon.

2 - Rapid filter

- Rapid filtering fields are proposed : «Id», «Name» and «Type».

Any change on «Id» and «Name»

- Will instantly filter data.
- Search is considered as «contains», so typing «1» in «Id» will select «1», «10», «11», «21», «31» and so on.

Selecting a «Type»

- Will restrict the list to the corresponding type.

3 - Buttons

- Click on to execute a textual search. (See: *Quick search*)
- Click on to define an advanced filter. (See: *Advanced filter*)
- Click on to define the columns displayed. (See: *Displayed columns*)
- Click on to get a printable version of the list.
- Click on to export it to PDF format.
- Click on to export data of the selected items in a CSV format file. (See: *Export to CSV format*)
- Click on to create a new item of the element.

4 - Checkbox «Show closed items»

- Flag on «Show closed items» allows to list also closed items.

5 - Column headers

- Click a column header to sort the list on that column (first ascending, then descending).

Note: Sorting is not always on the name displayed

- If the sorted column is linked to a reference list with sort order value, the sorting is executed on this sort value.

For instance

- Sorting on the «Status» allows to sort values such as defined in the workflow.

---

6 - Items list

- Click on a line (any column) will display the corresponding item in the detail window.

Quick search

The quick search allows to execute a textual search.

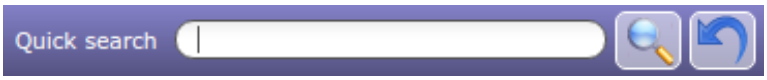

Fig. 3.19: Quick search zone

- Click on to execute the search.
- Click on to close the quick search.

Advanced filter

The advanced filter allows to define clause to filter and sort.

- The advanced filter definition dialog box is divided into two sections.

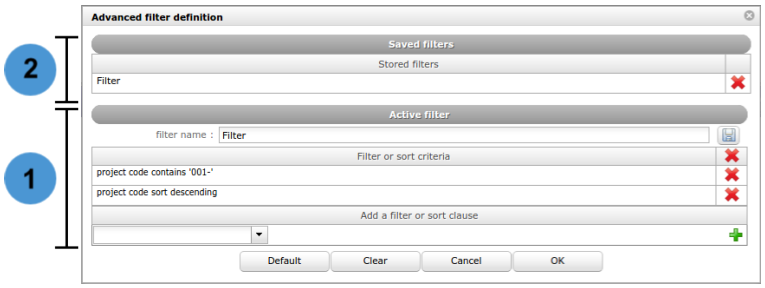

Fig. 3.20: Advanced filter definition dialog box

1 - Active filter

- This section allows to define the filter and sort clauses.

  Add criteria

  - Define the clauses of filter or sort in «Add a filter or sort clause».
  - Select the name of the field, the operator and the value to the clause.
  - Click on ✚ to add additional criteria.
  - Click on **OK** button to apply the filter.
  - Click on **Cancel** button to revert to previous filter.

  Remove criteria

  - To remove a criteria, click on ✖ on the line.
  - To remove all criteria, click on ✖ on the header.
  - Click on the **Clear** button to reset the active filter.

  Save active filter

  - Active filter can be saved to reuse.
  - Fill the filter name and click on 💾 to save the filter definition.

2 - Saved filters

- This section allows to manage saved filters.
- Click on a saved filter to retrieve its definition.
- Click on ✖ from a saved filter to delete it.
- Click on the **Default** button to to define the active stored filter as the default, kept even after disconnection.

Note: Default filter

- The default filter is defined for the user.
- The filter will be automatically applied in the next connection.

List of filters

- The filter list allows to select a stored filter.
- To see the filter list, move the cursor over the advanced filter icon.

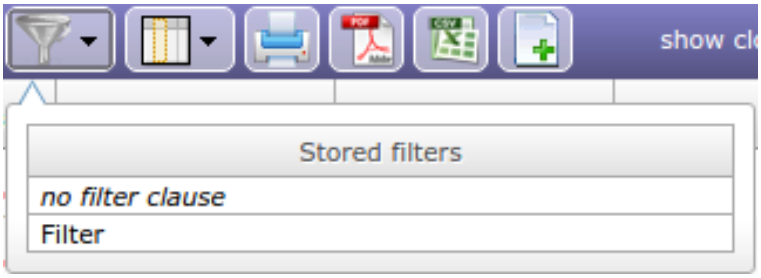

Fig. 3.21: Stored filters

- Click on the filter name to apply.
- Click on **«no filter clause»** to reset the filter.

Displayed columns

This functionality allows to define columns displayed in the list for this element.

- Click on **OK** button to apply changes.
- Click on **Reset** button to reset the list to its default format.

Note:

- The columns display is defined for the user.
- The definition will be automatically applied in the next connection.

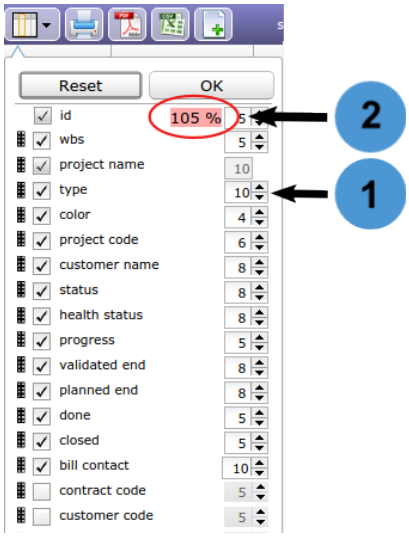

Fig. 3.22: Select columns to display dialog box

Column selection

- Use checkboxes to select or unselect columns to display.

Note:

- **Id** and **name** are mandatory fields.
- They cannot be removed from display.

Columns order

- Use the selector area ⁞ to reorder fields with drag & drop feature.

Column size

- Use the spinner button 1 to change the width of the field.
- Width is in % of the total list width.
- The minimum width is 1%.
- The maximum width is 50%.

Note: Field: Name

- The width of the field is automatically adjusted so that the total list width is 100%.
- The width of the field cannot be less than 10%.

Warning: Total width over 100%

- The total width must be limited to a maximum 100%.
- The exceedance will be highlighted beside the buttons. 2
- This may lead to strange display, over page width, on list, reports and PDF export, depending on the browser.

Export to CSV format

This functionality allows to export data of list in a CSV file.

The fields are regrouped and presented in the order as they appear in the item description.

- Click on **OK** button to export data.
- Click on **Cancel** button to close the dialog box.

Note:

- The active filter defined will be applied to export data.
- The CSV exported files can directly be imported through the import functionality. (See: *Import data*)
- The export definition is defined for each user.
- The same definition can be applied in the next export.

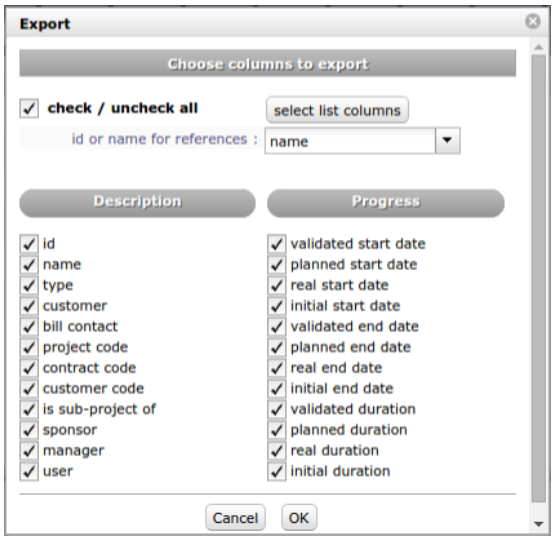

Fig. 3.23: Export dialog box

Fields selection

- Use the checkbox to select or unselect all fields.
- Click on **«Select list columns»** button to restrict selected fields to the ones that are currently displayed in the list.

Id or name for references

- For fields that reference another item, you can select to export either the id or the clear name for the referenced item.

3.1.6 Detail window

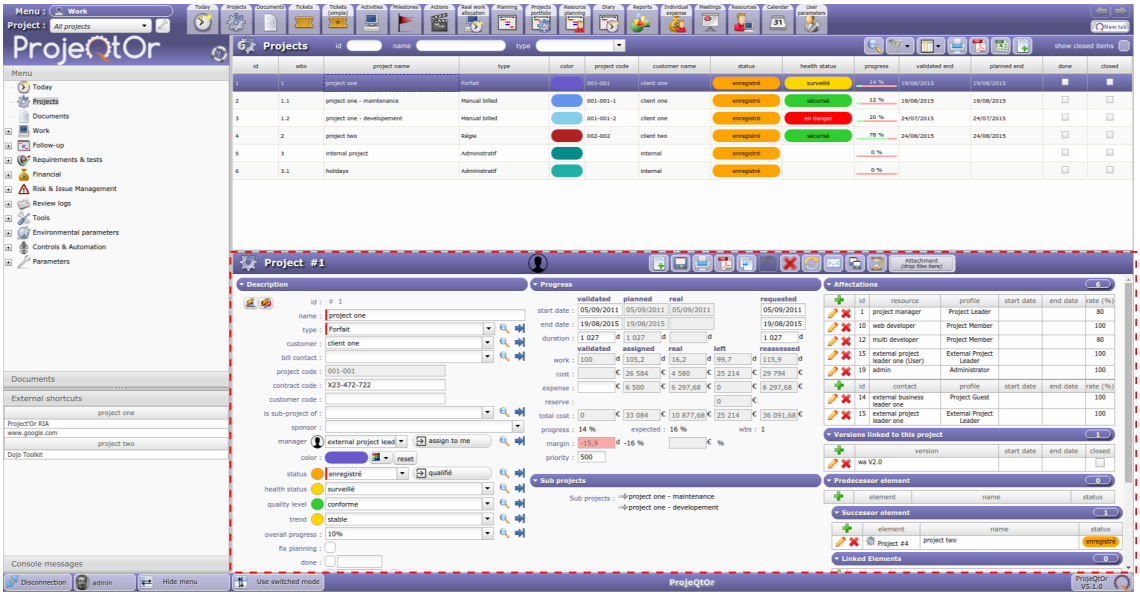

Fig. 3.24: Detail window

1 - Item identifier

- Identifies the item with the element name and the item id.
- Each element is identified with a distinctive icon.

2 - Creation information

- Information on the item (issuer and creation date).

Note:

- Administrator can change information.

---

3 - Buttons

- Click on to create a new item.
- Click on or use shortcut key `Control-s` to save the changes.
- Click on to get a printable version of the details.
- Click on to get a printable version of the details in PDF format.
- Click on to copy the current item. (See: *Copy item*)
- Click on to cancel ongoing changes.
- Click on to delete the item.
- Click on to refresh the display.
- Click on to send details of item by email. (See: *Email detail*)
- Click on to update several items in one operation. (See: *Multiple update*)
- Click on to show the checklist form. (See: *Checklist*)
- Click on to show history of changes. (See: *History of changes*)

Note:

- Some buttons are not clickable when changes are ongoing.
- button is clickable only when changes are ongoing.

Warning:

- When changes are ongoing, you cannot select another item or another menu item.
- Save or cancel ongoing changes first.

4 - Drop file area

- This area allows to add an attachment file to the item.
  - Drop the file in the area.
  - Or click on the area to select a file.

5 -Sections

- The fields are regrouped under a section.
- All sections can be folded or unfolded, clicking on the section title.
- The sections are organized in columns.
  - Maximum three columns can be displayed.
- Some sections are displayed on almost all screens. (See : *Common sections*)

  Item count in the list

  - When the section contains a list, the item count is displayed at right of the header.

Fig. 3.25: Header section dialog box

Copy item

- Allows copied an item of the element.
- The options displayed in dialog box depends on whether the element is simple or complex.

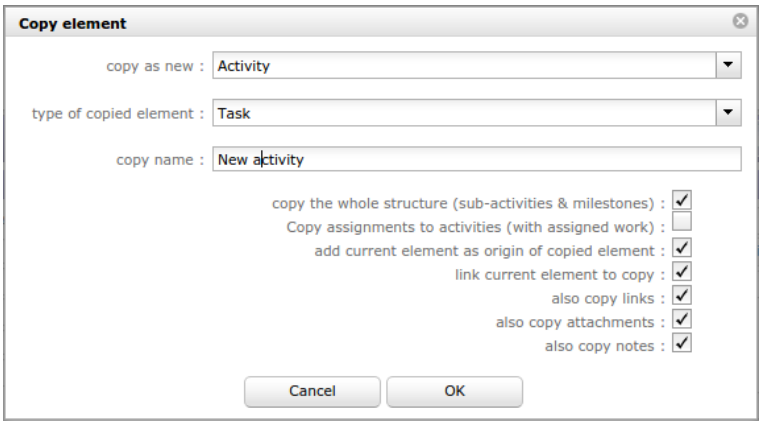

Fig. 3.26: Copy element dialog box

Simple element

- Simple element (environment parameters, lists,. . .) can only be copied “as is”.

Complex element

- Complex element (Tickets, Activities, . . .), it is possible to copy them into a new kind of elements.
- For instance, it is possible to copy a Ticket (the request) into an Activity (the task to manage the request).
- It is possible to select:
  - New kind of element.
  - Select new type (corresponding to the kind of element).
  - Change the name.
  - Select whether the initial element will be indicated as the origin of the copied one.
  - For main items, it is also possible to choose to copy links, attachments and notes.
  - For Projects and Activities, it is also possible to copy the hierarchic structure of activities (sub-projects, sub-activities).

Note:

- The new item has the status “copied”.

Email detail

Allows to send an informative email to defined recipients list.

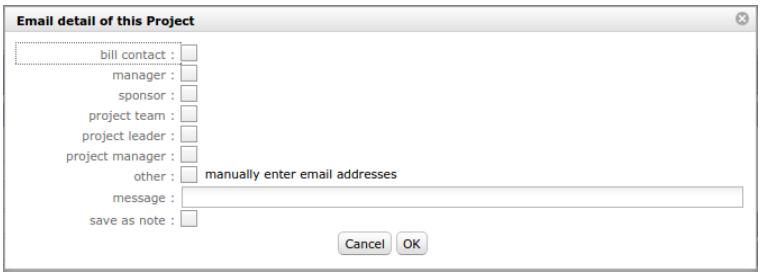

Fig. 3.27: Email detail dialog box

Recipients list

- The list is defined according to the role of the recipient. (See: *ProjeQtOr roles*)
- Flag on the role checkbox to define the recipients list.

  Checkbox "other"

  - Flag on the checkbox "other" to manually enter email addresses.

Message

- The message that will be included in the body of the email, in addition to a complete description of the item.

Save as note

- Flag on to indicate the email message will be saved as a note.

Multiple update

Allows to update several items in one operation.

- The fields that can be updated depends on the element.
- The fields are grouped by section.
- Click on to quit the multiple mode window.

Select items

- The selection of items can be done by selecting them in the list window. (1)
- Or use checkboxes to select/unselect all items in the list. (2)
- The count of items selected is displayed. (3)

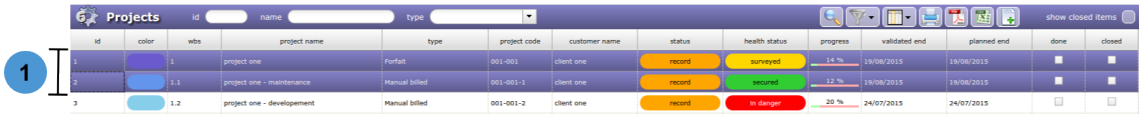

Fig. 3.28: Multiple mode item selection

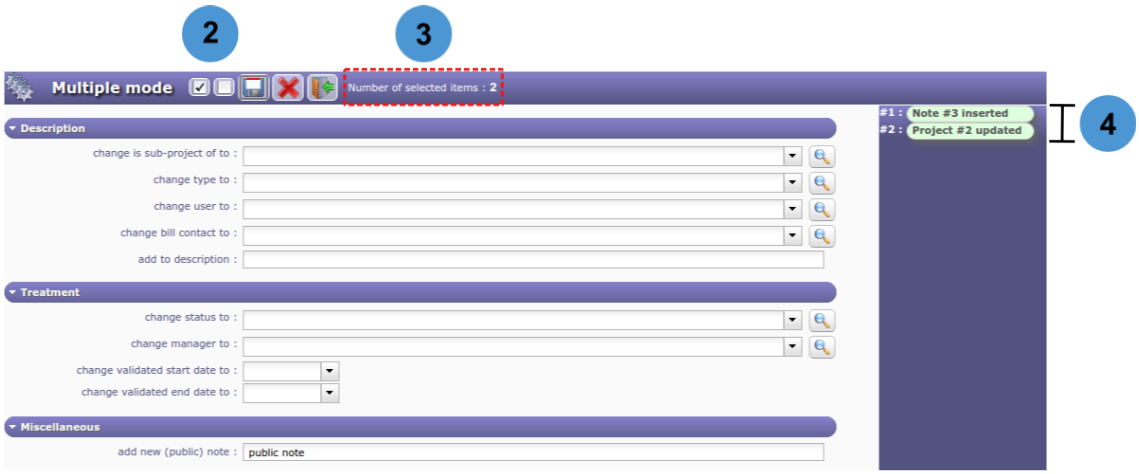

Fig. 3.29: Multiple mode window

Apply updates

- Click on to save updates on selection.
- Click on to delete all selected items.
- The update will be applied to all the items (if possible) and a report will be displayed on the right. (4)

Checklist

Allows to fill a checklist form.

A checklist is available, whether a checklist form is already defined for the element or the element type.

Note:

- The checklist forms are defined in *Checklists* screen.

Note:

- The access to view the checklist depends on your access rights.

Displaying the checklist

- The user parameter «Display checklists» allows to define whether the checklist appears in a section or in a dialog box.
- If the value “On request” is set, the button appears on the detail header window.
  - Click on to display the checklist form.
- With other value the “Checklist” section appears in the detail window.

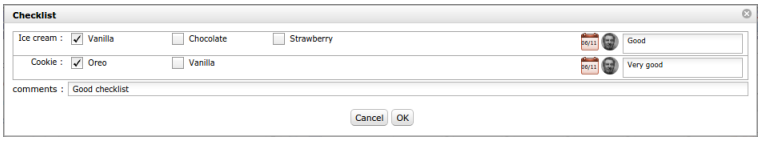

Fig. 3.30: Checklist dialog box

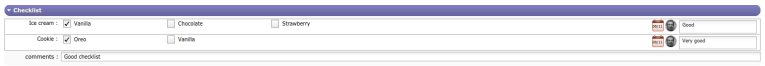

Fig. 3.31: Checklist section

How to use

- The user just has to check information corresponding to the situation.
- When done, the user name and checked date are recorded and displayed.
- Each line can get an extra comment, as well as globally on the checklist.

History of changes

All the changes items are tracked.

They are stored and displayed on each item.

Note:

- On creation, just an insert operation is stored, not all the initial values on creation.

Table 3.1: Fields of changes

Field	Description
Operation	The operation on the item (insert or update).
Data	The field modified.
Value before	The value of the field before the update.
Value after	The value of the field after the update.
Date	Date of change operation.
User	Name of the user who operated the change.

Displaying the history of changes

- The user parameter «Display history» allows to define whether the history of changes appears in a section or in a dialog box.
- If the value “On request” is set, the button appears on the detail header window.
  - Click on to display the history of changes.
- If the value “Yes” is set, the “Change history” section appears in the detail window.

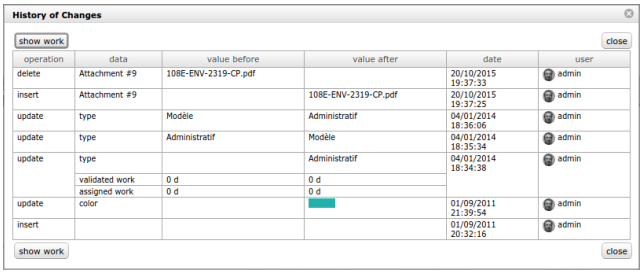

Fig. 3.32: History of changes dialog box

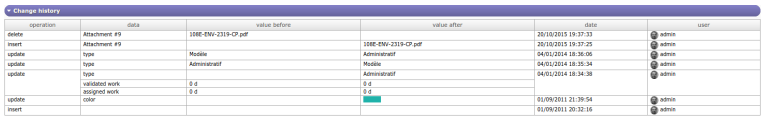

Fig. 3.33: Change history section

Show/Hide work

- This button allows to show or hide work changes done in “Real Work Allocation”.
- For section «Change history» the display of work is defined in user parameter «Display history».

Special fields

This section describes the ProjeQtOr special fields.

Accelerator buttons

Move to next status button

- This button allows to skip to the next status without having to open the list.
- The next status is defined by the workflow linked to the type of element.

Fig. 3.34: Move to next status button

Assign to me button

- This button allows to set the current user in the related field.

Fig. 3.35: Assign to me button

Combo list field

- Combo list field allows to search, view or create item associated with the field.

Note:

- The access to view or create item depends on your access rights.
- Some buttons can be not available.

Fig. 3.36: Combo list field

- Click on to get the list of values.
- Click on will directly go to the selected item.

  Note:

  – Click on to return to the last screen. (More detail, see: *Top bar*)

- Click on to access item details.
- The next action depends on whether the field value is filled or not.

Field value is filled

- If the field value is filled, the details of item associated are displayed.

Fig. 3.37: Detail of list element dialog box

- Click on to re-select an item.
- Click on to close the dialog box.

Field value is empty

- If the field value is empty, the list of items is displayed, allowing to select an item.

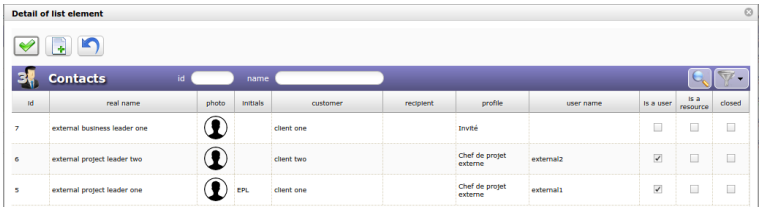

Fig. 3.38: Detail of list element (list) dialog box

- Click on to select items.
- Click on to create a new item.
- Click on to close the window.

Note: Window header

- You have access to *Rapid filter*, *Quick search* and *Advanced filter*.

Note: Select several items

- Some elements is possible to select several items, use `Control` or `Shift`.

Long text field

- Long text fields allow to write description, results, notes, ...
- A mini editor is provided.
- Text zone is extendable.

Fig. 3.39: Long text field

Note: User parameter "Editor mode always on"

- This parameter defines that the editor is always activated on long text fields.

Origin field

- This field allows to determine the element of origin.
- The origin is used to keep track of events (ex.: order from quote, action from meeting).
- The origin may be selected manually or automatically inserted during copying an element.

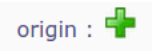

Fig. 3.40: Origin field

Origin element

- Click on ✚ to add a orgin element.
- Click on ✖ to delete the link.

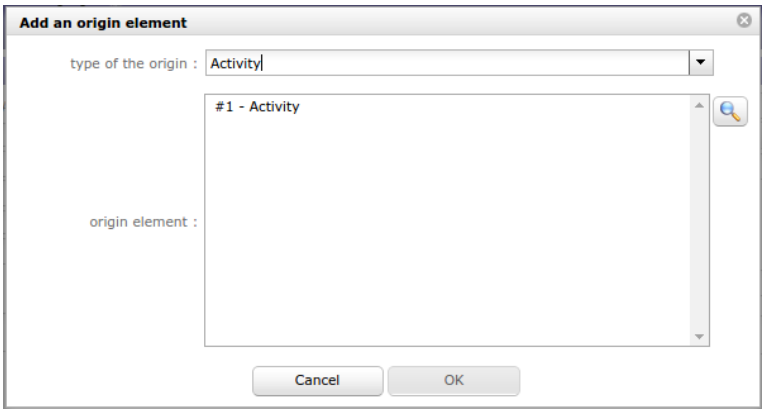

Fig. 3.41: Add an origin element dialog box

Table 3.2: Fields of add an origin element dialog box

Field	Description
Type of the orign	Type of element to be selected.
Origin element	item to select.

Set color field

- This field allows to set the color of an item.
- Used to differentiate items in list or report.
- Click on list of colors to select.
- Click on “Reset” button to erase.

Fig. 3.42: Set color field zone

3.1.7 Info bar

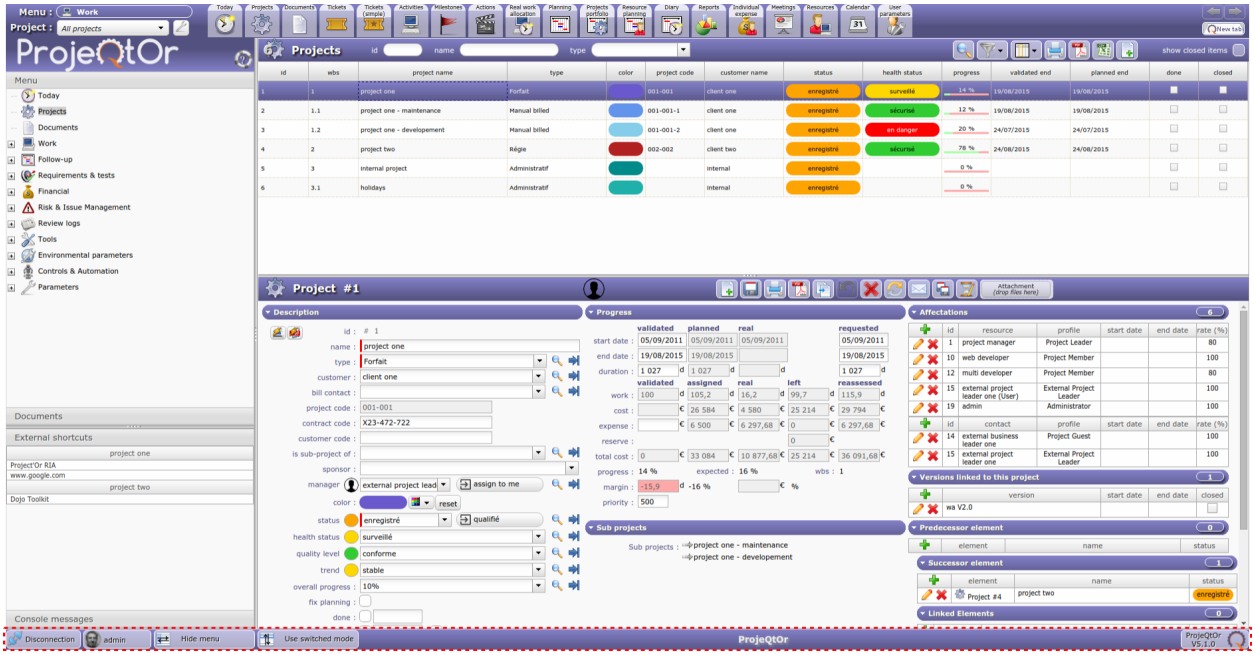

Fig. 3.43: Info bar

Fig. 3.44: Info bar zone

1 - Log out button

- Allows to disconnect the user.

Note: User parameter "Confirm quit application"

- This parameter defines whether a disconnection confirmation will be displayed before.

---

2 - User parameters button

- Allows to access user parameters.

3 - Hide and show menu button

- Allows to hide or show the menu section.

Note: User parameter "Hide menu"

- This parameter defines whether the menu is hidden by default.

---

4 - Switched mode button

- Allows to enable or disable switched mode that allows to switch between list and detail windows.
- Window selected is displayed in “full screen” mode.
- Hidden window are replaced by a gray bar.
- Click on the gray bar to switch between windows.

Note: User parameter “Switched mode”

- This parameter defines whether switching mode is enabled or not.

---

5 - Database name

- Display database name.

6 - Version button

- Displays the application version.
- Click on button to access to ProjeQtOr site.

3.2 Alerts

Users may receive some information displayed as pop-up on the bottom right corner of the screen.

Three kinds of information may be displayed:

- Information
- Warning
- Alert

Fig. 3.45: Information pop-up

Alert response

Two possible actions:

- Select to remind you in a given number of minutes (message will close and appear again in the given number of minutes).
- Mark it as read to definitively hide it.

Note:

- Possibility to mark the alert as read in *Alerts* screen.

Send alert

An alert can be sent by the administrator or indicator calculation.

By the administrator

- The administrator can send alert by administration console. (See: *Administration console*)

Indicator calculation

- Indicator calculation sends only warning and alert message.
- Alert coming from indicator calculation message contains more information:
- Item id and type.
- Indicator description.
- Target value.
- Alert or warning value.
- The indicators are defined in *Indicators* screen.

Alert icon

On indicatorable items, you may see a small icon on top left of the detail of the item.

Just move the mouse over the icon to display, which indicator has been raised.

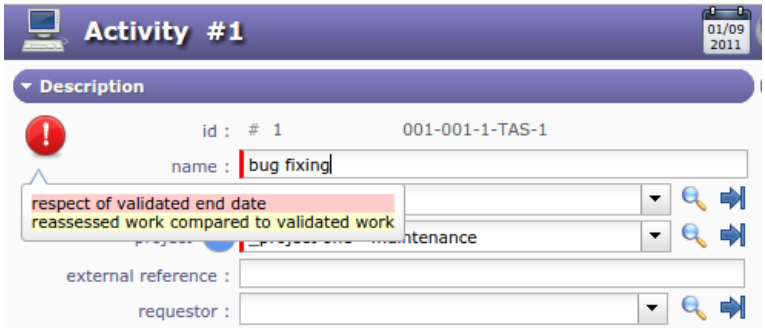

Fig. 3.46: Alert icon

3.3 Themes

Users can select colors Theme to display the interface.

The new theme is automatically applied when selected.

Note: User parameter "Theme"

- This parameter defines the theme to display.

3.4 Multilingual

ProjeQtOr is multilingual.

Each user can choose the language to display all the captions.

Note: User parameter "Language"

- This parameter defines the language used to display captions.

3.5 Keyboard functionality

Shortcut keys

- `Control-s` to save the changes.
- `F1` to open the online user manual, to the page corresponding to the actual screen.

Numeric keypad

- The point will be replaced by a comma if the numeric format requires it.

3.6 Common sections

Some sections are displayed on almost all screens.

Those sections allows to set information or add information to an item of the element.

3.6.1 Description section

This section allows to identify items of the element.

- Information grouped under this section are:
  - *Id*
  - Element type
  - Name
  - Description
  - Current situation
  - Stakeholder
  - Objective
  - Reference
  - Link

3.6.2 Treatment section

This section contains information about item treatment.

Depending on the element, this section may have a different name.

- Information grouped under this section are:
  - Status and Dates
  - *Responsible*
  - Link
  - Outcome
  - Comment

3.6.3 Affectations section

Concepts

- *Profiles definition*
- *Project affectation*

This section allows to manage project affectations.

Table 3.3: Fields of affectations list

Field	Description
Id	Unique Id for the affectation.
Project	Project affected to.
Resource	Name of the affected resource.
Profile	Selected profile.
Start date	Start date of affectation.
End date	End date of affectation.
Rate	Affectation rate for the project (%).

Fields: Project & Resource

- If the project affectations management is done on the «*Project*» screen, the field **«resource»** will be displayed.
- If the project affectations management is done on the screen «*Resources*», «*Contacts*» or «*Users*», the field **«project»** will be displayed.

Affectation list management

- Click on ✚ to create a new affectation.
- Click on to update an existing affectation.
- Click on ✖ to delete the corresponding affectation.

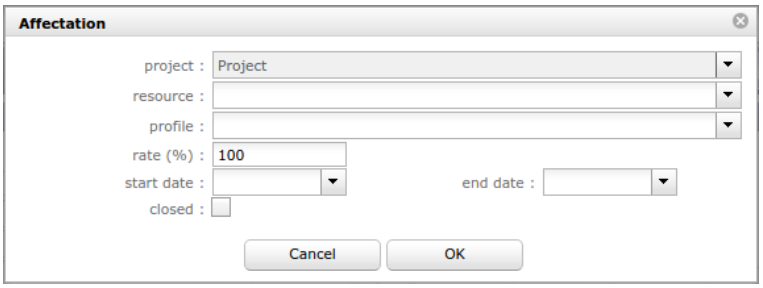

Fig. 3.47: Affectation dialog box

Table 3.4: Fields of affectation dialog box

Field	Description
Project	Project list.
Resource	Resource list.
Profile	Profile list.
Rate	Rate (in %) of the affectation to the project.
Start date	Start date of affectation.
End date	End date of affectation.
Closed	Flag to indicate that affectation in not active anymore, without deleting it.

*** Required field**

Field: Resource

- This field can contain a list of users, resources or contacts according to which screen comes from project affectation.

Field: Profile

- The user profile defined will be displayed first.
- If the profile field is not available, the profile defined for each resource will be selected.

Field: Rate

- 100% means a full time affectation.

Note:

- Depending on which screen is used to manage project affectations, the behavior of fields will change.

3.6.4 Linked Elements section

This section allows to manage link between items of elements.

Table 3.5: Fields of linked elements list

Field	Description
Element	Type and id of the linked element.
Name	Name of the linked element.
Date	Date of creation of the link.
User	User who created the link.
Status	Actual status of the linked element.

Used for

- Allows to associate items on different elements in the same project.
- A project can be linked with other.
- Click on an item name to directly move to it.

  Note:
  - Click on to return to the last screen. (More detail, see: *Top bar*)

Reciprocally interrelated

- If Item A is linked to Item B, Item B is automatically linked to Item A.

Note:
- A link between items has no impact on them treatment.

Linked elements management

- Click ✚ to create a new link.
- Click on ✖ to delete the corresponding link.

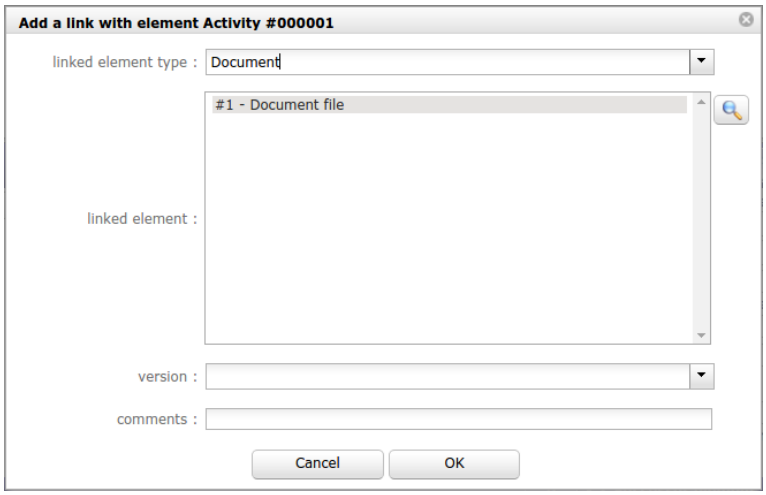

Fig. 3.48: Add a link with element dialog box

Link with Document

- Click on to download the file of document.

  Specified version

  - A link with a document element offer the possibility to select a specific version.
  - A direct link to version of the document is created.

  Not specified version

  - If the version is not specified, the last version will be selected.
  - The download will transfer always the last version of the document.

3.6.5 Attachments section

This section allows to attach files or hyperlinks to items of elements.

Table 3.6: Fields of attachments list

Field	Description
Id	Unique Id for the attachment.
File	File name or hyperlink.
Date	Date of creation of the attachment.
User	User who created the attachment.

Select an attachment

- Select an attachment depends on whether is a file or a hyperlink.
  - Click on to download attachment file.
  - Click on to access to hyperlink.
  - Click on to view the PDF file online.

Delete an attachment

- Click on to delete an attachment.

Add an attachment

- Click on ✚ to add an attachment file to an item.
  - Dialog box "Attachment file" will be displayed.
- Click on to add hyperlink to an item.
  - Dialog box "Hyperlink" will be displayed.

Attachment file

Note: To upload a file

- Select file with "Browse" button or drop the file in "drop files here" area.
- Attached files are stored on server side.
- Attachments directory is defined in *Global parameters* screen.

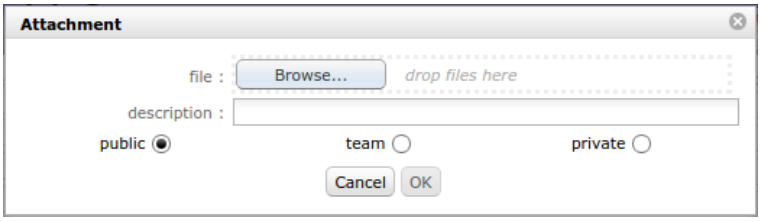

Fig. 3.49: Attachment file dialog box

Hyperlink

Note: Hyperlink

- Enter hyperlink in «Hyperlink» field.

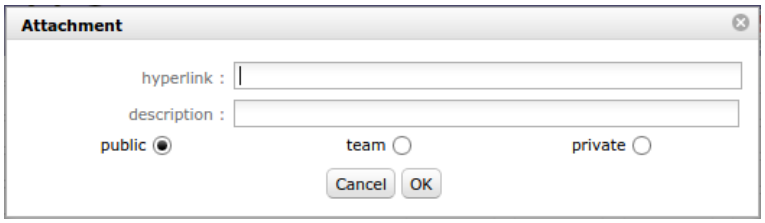

Fig. 3.50: Hyperlink dialog box

Table 3.7: Fields of attachment dialog box

Field	Description
Description	Description of attachment.
Public	Attachment is visible to anyone.
Team	Attachment is visible to every member of the creator's team.
Private	Attachment is visible only to the creator.

3.6.6 Notes section

This section allows to add notes on items of elements.

Notes are comments, that can be shared to track some information or progress.

Table 3.8: Fields of notes list

Field	Description
Id	Unique Id for the note.
Note	Text of the note.
Date	Date of creation or modification of the note.
User	Name of the user who created the note.

Predefined note

- The list of values appears whether a predefined note exists for an element or an element type.
- Selecting a predefined note will automatically fill in the note text field.
- Predefined notes are defined in *Predefined notes* screen.

Note visibility

- Public: Visible to anyone.
- Team: Visible to every member of the creator's team.
- Private: Visible only to the creator.

Notes list management

- Click on ✚ to add a note to an item.
- Click on to edit the note.
- Click on ✖ to delete the note.

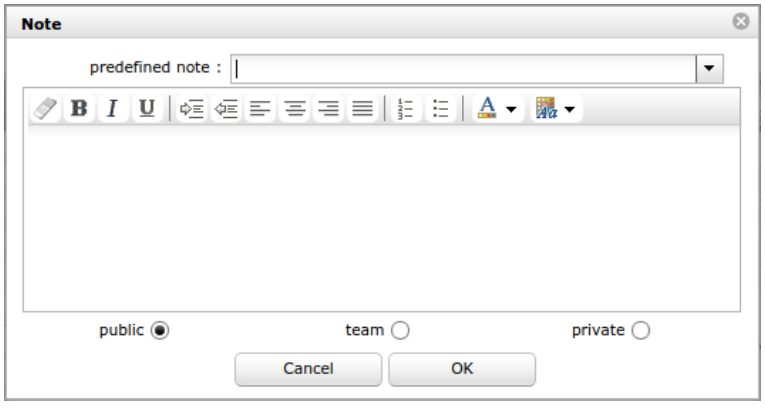

Fig. 3.51: Note dialog box

3.7 User parameters

Concepts

- *Photo*

User parameters screen allows configuration of personal settings.

Note:

- User parameters are efficient even without saving.
- Saving parameters will retrieve the selected parameters on each connection.

Section: Display parameters

- Generic display parameter for user.

Section: Graphic interface behavior

- Selection of graphic interface behavior.

Section: Print & Export parameters

- Selection of printing history for detailed items and destination for printing and PDF export.

Section: Miscellaneous

- Default selected project and choice of character used to indent lists of projects, to represent the WBS structure of projects and sub-project (cannot be a “space”, can be “none” to get flat lists).

Section: Photo

- Photo of the user.

Section: Password

- Changes the user’s password.

CHAPTER 4

Planning elements

ProjeQtOr provides all the elements needed to build a planning from workload, constraints between tasks and resources availability.

Planning elements

- *Project*
- *Activity*
- *Milestone*
- *Common sections*
  - *Assignment*
  - *Progress*
  - *Predecessor and Sucessor element*

Planning elements are : *Project*, *Activity*, *Milestone*, *Test session*, *Meetings* and *Periodic meetings*.

All previous elements can be planning, following with Gantt chart.

Progress

- All planning elements have own progress data.
- Some metrics are consolidate on top activities and project.

4.1 Project

Other sections

- *Progress*
- *Affectations*
- *Predecessor and Sucessor element*
- *Linked element*
- *Attachments*
- *Notes*

Section: Description

Table 4.1: Project description section fields

Field	Description
Id	Unique Id for the project.
Name	Short name of the project.
Type	Type of project.
Customer	The customer of the project.
Bill contact	Billing contact.
Project code	Code of the project.
Contract code	Code of the contract of the project.
Customer code	Code of the customer of the project.
Is sub-project of	Name of the top project if this project is a sub-project.
Sponsor	Name of the sponsor of the project.
Manager	Name of the resource who manages the project.
Color	Color of the project, to be displayed in some reports.
Status	Actual *status* of the project.
Health status	Global health status of the project, displayed on today screen.
Quality level	Estimation of quality level of project (result of audits).
Trend	Trend of global project health.
Overall progress	Overall progress to be selected in a defined list.
Fix planning	Selector to fix the planning of the project, and its sub-projects.
Done	Flag to indicate that project is been finished.
Closed	Flag to indicate that project is archived.
Cancelled	Flag to indicate that project is cancelled.
Description	Complete description of the project.
Objectives	Objectives of the project.

*** Required field**

Section: Version linked to this project

Section: Sub projects

4.2 Activity

An activity is a kind of task that must be planned, or that regroups other activities.

It is generally a long time activity, that will be assigned to one or more resources.

Activities will appear on Gantt planning view.

For instance, you can manage as activities :

- Planned tasks.
- Change requests.
- Phases.
- Versions or releases.

Activities regroupment

- Activities can have parents to regroup activities.
- So a WBS (work breakdown structure number) is calculated for the activities.
- Activities can be sorted inside their parent activity, on the Gantt planning view, using drag and drop.
- Parent activity must belong to the same project.

Assigned ressources

- Resources are can be assigned to activities.
- This means that some work is planned on this activity for the resources.
- See : *Assignment*

Other sections

- *Assignment*
- *Progress*
- *Predecessor and Sucessor element*
- *Linked element*
- *Attachments*
- *Notes*

Section: Description

Table 4.2: Activity description section fields

Field	Description
Id	Unique Id for the activity.
Name	Short description of the activity.
Activity type	Type of activity.
Project	The project concerned by the activity.
External reference	External reference of the activity.
Requestor	Contact at the origin of the activity.
Origin	Element which is the origin of the activity.
Description	Complete description of the activity.

*** Required field**

Section: Treatment

Table 4.3: Activity treatment section fields

Field	Description
Parent activity	Parent activity for grouping purpose.
Status	Actual *status* of the activity.
Responsible	Resource who is responsible for the activity.
Handled	Flag to indicate that activity is taken into account.
Done	Flag to indicate that activity has been treated.
Closed	Flag to indicate that activity is archived.
Cancelled	Flag to indicate that activity is cancelled.
Target version	The target version of the product that will deliver the object of the activity.
Result	Complete description of the treatment done on the activity.

*** Required field**

4.3 Milestone

A Milestone is a flag in the planning, to point out key dates.

Milestones are commonly used tom check delivery dates.

They can also by used to highlight transition from one phase to the following one.

Opposite to Activities, Milestones have no duration and no work.

Floating milestone

- This milestone will automatically move to take into account dependencies.

Fixed milestone

- This milestone is fixed in the planning, not taking into account predecessor dependencies.
- This kind of milestone is interesting for instance to set-up start date for some tasks.

Other sections

- *Predecessor and Sucessor element*
- *Linked element*
- *Attachments*
- *Notes*

Section: Description

Table 4.4: Milestone description section fields

Field	Description
Id	Unique Id for the milestone.
Name	Short description of the milestone.
Milestone type	Type of milestone.
Project	The project concerned by the milestone.
Origin	Element which is the origin of the milestone.
Description	Long description of the milestone.

*** Required field**

Section: Treatment

Table 4.5: Milestone treatment section fields

Field	Description
Parent activity	Parent activity for grouping purpose.
Status	Actual *status* of the milestone.
Responsible	Resource who is responsible for the milestone.
Handled	Flag to indicate that milestone is taken into account.
Done	Flag to indicate that milestone has been treated.
Closed	Flag to indicate that milestone is archived.
Cancelled	Flag to indicate that milestone is cancelled.
Target version	The target version of the product that will deliver the object of the milestone.
Result	Complete description of the treatment done on the milestone.

*** Required field**

Section: Progress

Field	Description
Validated due date	Committed end date : milestone should not end later.
Planned due date	Calculated end date, taking into account all the constraints.
Real due date	Real end date, when milestone is set to “done”.
Requested due date	Wished end date.

Field: WBS

- Hierarchical position of the milestone in the global planning.

List of value: Planning mode

- Planning mode for the milestone (floating or fixed).

4.4 Common sections

4.4.1 Assignment

Resources can be assigned to activities.

It is possible to assign several times the same resource to an activity.

It can for instance be used to add extra work without modifying initial assignment.

Go to

- Click on the resource name will directly move to the resource.

Project affectaion

- Only resources affected to the project of the activity can be assigned.
- Affectations may have start and end dates.
- So, for a given assignment planned work will not start before affectation start date on project of the activity and will stop on affectation end date.
- This can lead to incompletely planned tasks. These would appear as brown bars in the Gantt view.

Assignment Popup

Click on ✚ to assign a new resource. An "Assignment" pop up will be displayed.

Click on to modify the assignment.

Click on ✖ to delete the assignment.

Note:

- If real work exists for an assignment, it can not be deleted.

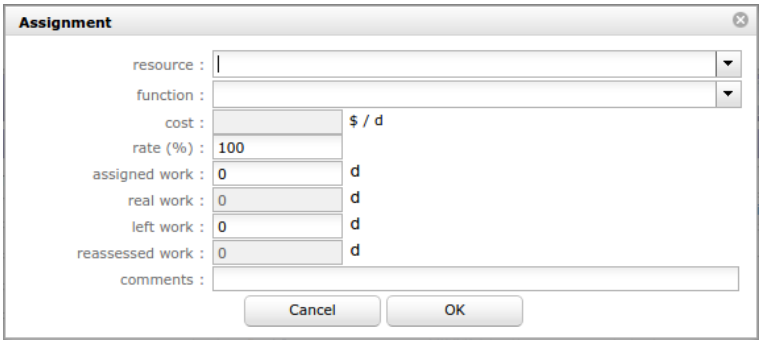

Fig. 4.1: Assignment dialog box

Table 4.6: Assignment dialog box fields

Field	Description
Resource	Name of the resource assigned to the activity.
Function	The function of the resource on this assignment.
Cost	The daily cost of the assignment.
Rate	The max rate (in %) to plan the resource on the activity by day.
Assigned work	Work initially planned to complete the task.
Real work	Real work entered by the resource on his weekly report, on the "real work allocation" screen.
Left work	Work left to complete the task.
Planned work	The new total work planned to complete the task.
Comments	Any comment on the affectation.

Fields: Function and Cost

- Function determine the daily cost of the assignment.
- Cost is automatically updated from the function of the resource.

Field: Rate

- For instance, if rate is 50%, the resource will not be planned more than half days on the activity.

Field: Left work

- Calculated as "Assigned Work" – "Real Work".
- Must be updated by the resource on the "real work allocation" screen to reflect the really estimated work needed to complete the task.

Field: Planned work

- "planned work" = "real work" + "left work"

Field: Comments

- When a comment exists, the icon will appear on the Assignment section, and on the description of the activity on the "real work allocation" screen.
- Moving the mouse over the description will display the comment.

4.4.2 Progress

The progress allows to follow up planning element.

This section cover progress to planning element : project, activity and test session.

Reassessed metrics

- Reassessed is the sum of real and left metrics.

Expense reassessed metrics

- Assigned minus real metrics.

Consolidating metrics

- fdfdf

Real metrics

- Real metrics input entered by an resource on the “Real work allocation” screen.

Duration metrics

- Allow to determine planning elements duration for project, activity and test session.

Calculating duration

- Duration is the **work days** numbers between end and start dates.

End date

- If not set, end date is the start date + duration.

Table 4.7: Duration metrics fields

Field	Description
Validated start date	Planning element should not start later.
Validated end date	Planning element should not end later.
Validated duration	Planning element should not last longer.
Planned start date	Calculated start date, taking into account all the constraints.
Planned end date	Calculated end date, taking into account all the constraints.
Planned duration	Calculated duration.
Real start date	Date of the first real work input.
Real end date	Date of the last real work input.
Real duration	Calculated duration.
Requested start date	Wished start date.
Requested end date	Wished end date.
Requested duration	Wished duration.

Field: Real end date

- The real end date appearing only when planning element status is "done".

Work metrics

- Planning elements work is the sum of tasks like activity, test session and meeting.

Table 4.8: Work metrics fields

Field	Description
Validated work	Work of the planning element should not be more.
Assigned work	Sum of all the work for the assignments on the planning element.
Real work	Sum of all the work really spent on the planning element.
Left work	Left work to complete.
Reassessed work	Work needed to complete.
Progress	Actual progress of the work, in percent real under planned.
Expected	Expected progress of work, in percent real under validated.
Margin	Margin between validated and planned work.

Field: Margin

- Metrics available only in project progress section.

Cost metrics

Planning elements cost

- Planning elements cost is the sum of tasks like activity, test session and meeting.

Expense cost

- Expense cost is the sum of individual and project expense.
- Metrics available only in project progress section.

Table 4.9: Cost metrics fields

Field	Description
Validated cost	Cost of the planning element should not be more.
Assigned cost	Sum of all the cost for the assignments on the planning element.
Real cost	Sum of all the cost really spent on the planning.
Left cost	Left cost to complete.
Reassessed cost	Cost needed to complete.
Validated expense	Expense of the project should not be more.
Assigned expense	Sum of all the expense on project for the planned amount.
Real expense	Sum of all the expense on project for the real amount.
Left expense	Alaways zero for expense.
Reassessed expense	Sum of all the expense on project for reassessed amount.
Margin	Margin between total validated and total planned cost.

Field: Margin

- Metrics available only in project progress section.

Total cost

- Sum of planning elements and expense cost.
- Metrics available only in project progress section.

Ticket metrics

- Allows to display global work for tickets linked with the activity.
- Metrics available only in activity progress section.

Table 4.10: Ticket metrics fields

Field	Description
Number	Numbers of ticket linked with the activity.
Estimated	Sum of all planned work of ticket linked with the activity.
Real	Sum of all real work of ticket linked with the activity.
Left	Sum of all left work of ticket linked with the activity.

Others metrics

Field: WBS

- Hierarchical position of the planning element in the global planning.

Field: Priority

- *Planning priority* of the planning element.

List of values: Planning

- ddfd

4.4.3 Predecessor and Sucessor element

Planning element can have predecessors and successors, to generate dependencies.

Click ✚ on the corresponding section to add a predecessor or successor. An “add predecessor” or “add successor” pop up will be displayed.

Select the type of element to add as predecessor or successor.

- The list of items below will then be automatically updated.

Click on ✎ to edit the dependency.

Click on ✖ to delete the corresponding dependency.

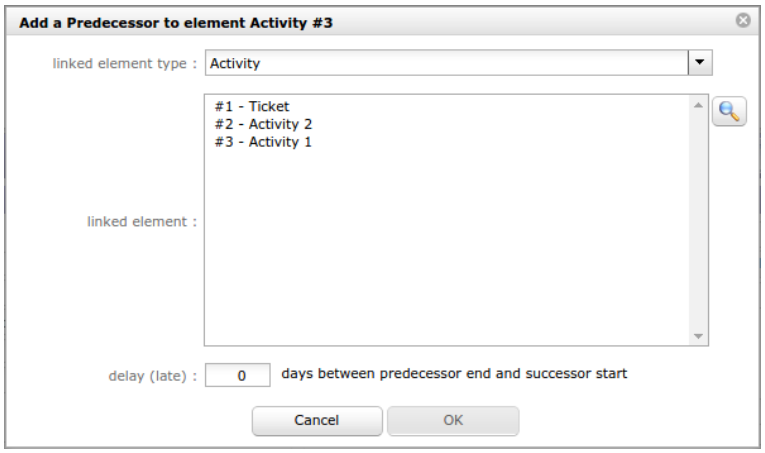

Fig. 4.2: Predecessor or Successor element dialog box

Note:

- Recursive loops are controlled on saving.
- Predecessors and successors must belong to the same project or be a project.

Linked element

- Click on 🔍 to show element detail.
- Depends on whether the element is selected or not a pop up is displayed.
- Detail about pop up, see *Combo list fields*

Multi-value selection

- Multi-line selection is possible using `Control` key while clicking.

Delay (late)

- Days between predecessor end and successor start.

Reciprocally interrelated

- If element A is a predecessor of element B, element B is automatically successor of element A.

Dependency information

Field	Description
Element	Type and id of the predecessor or successor.
Name	Name of the dependency.
Date	Date of creation of the dependency.
User	User who created the dependency.
Status	Actual status of the dependency.

Go to

- Click on the name of a predecessor or successor will directly move to it.

CHAPTER 5

Real work allocation

As ProjeQtOr implements Effort Driven planning (work drives planning calcuation), one of the key to manage project progress is to enter the real work and re-estimate left work for all ongoing tasks.

ProjeQtOr provides a dedicate screen for this feature, to ease this input so that entering real work is as quick as possible.

Contents

- *Real work allocation*
  - *Selection timesheet*
  - *Input fields*
  - *Input entry validation*

5.1 Real work allocation

This screen is devoted to input of real work.

Resource enters work day by day, on each assigned task.

The input is for one resource, on a weekly basis.

Note:

- The corresponding cost to the real work is automatically updated to the assignment, activity and project.

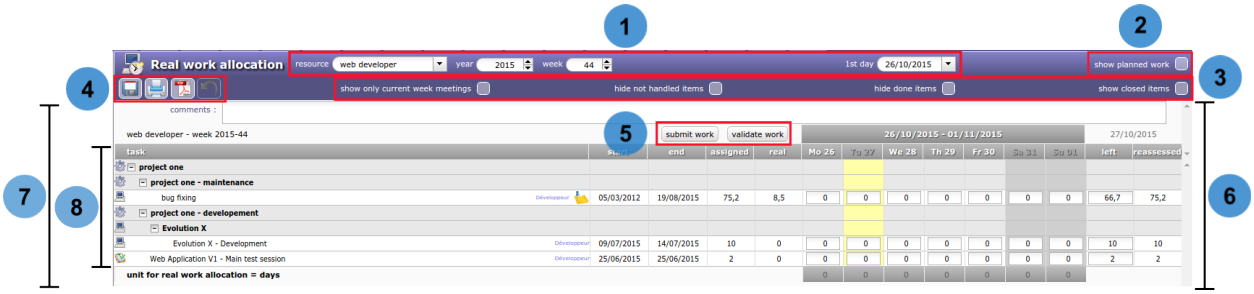

Fig. 5.1: Timesheet zone screen

Selection timesheet

- Allows to select a timesheet for a resource and for a period. (1)
- More detail about selection timesheet, see : *Selection timesheet*.

Show planned work

- Flag selected allows to display planned work. (2)
- Planned work is indicated over each input cell, on top right corner, in light blue color.
- Allow to display the planned work of each task each day.

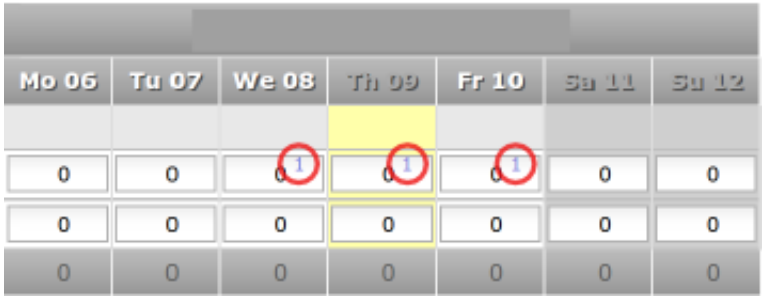

Fig. 5.2: Planned work displayed zone

Note:

- The planned work will be deleted when the real work is entered (to avoid duplication of work in reports).

Filters

- Filters allow to show or hide task in the task list. (3)

  Show only current week meeting

  - Flag allows to show only the week meeting task.

  Hide not handled items

  - Flag allows to hide task not take over.

  Hide done items

  - Flag allows to hide done task.

  Show closed items

  - Flag allows to show closed task.

Buttons

Buttons of the timesheet: (4)

- Click on to save timesheet data.
- Click on to print timesheet.
- Click on to export timesheet in PDF format.
- Click on to undo modification on the timesheet.

Data entry validation

Buttons allow to send and validate real work. 5

Button: Submit work

- Users can send works to project leader.

Button: Validate work

- Project leaders can validate works.

Scroll bar

- 6 Scroll bar allows the scrolling on imputation lines.
- The header of table stays visible.
- The footer of the table (with the sum of inputs) remains visible, fixed, as soon as the number of lines is greater than 20.

Input fields

- Input fields in timesheet. 7
- More detail about, see : *Input fields*

Tasks list

Task list allows to display each resource affectation task. 8

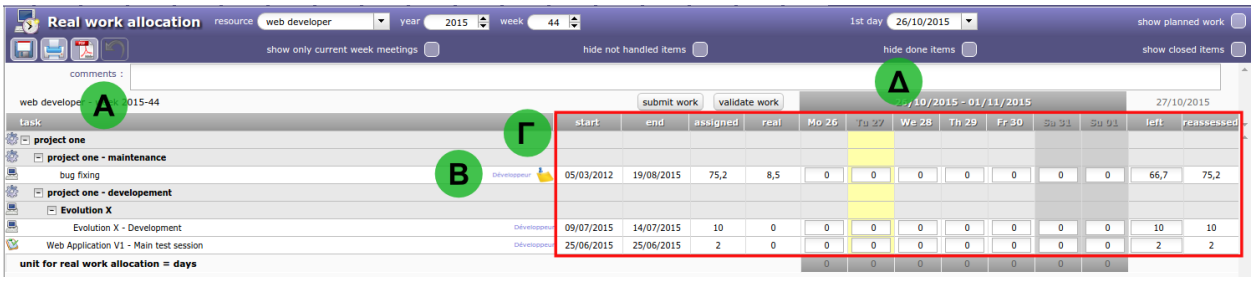

Fig. 5.3: Task list zone

Tasks A

- Tasks are regrouped by project.
- Tasks displayed in the list depends on :
  - Assigned tasks planified during this period.
  - Selected filter flags.
  - Behavior defined in *Global parameters* screen.
- Click on the name of the activity to access it.
- Click on the icon of the activity to display it detail without leaving the current screen.

Function of the assignement B

- The function on the assignment is displayed in blue after the name of the task.
- A resource assigned to the same task with many functions, several input line is displayed.

Comment on the assignment Г

- The icon indicates there is a comment on the assignment.
- Just move the mouse over the activity to see the comment.

Task metrics Δ

- **Planned dates**: Planned start and end dates for the task.
- **Assigned**: Assigned work for the task.
- **Real**: Sum of real work for the task.
- **Left**: Left work for the task.
- **Reassessed**: Reassessed work for the task

5.1.1 Selection timesheet

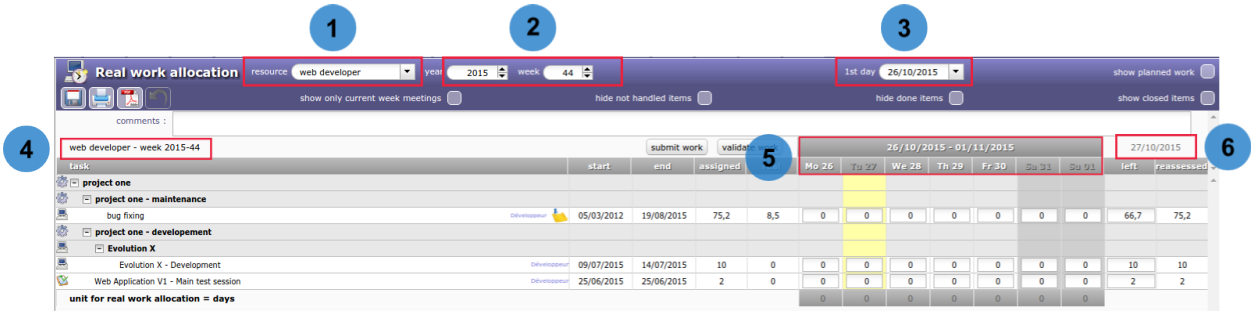

Fig. 5.4: Timesheet selector zone

Selection of the resource

- Users can only select themselves as a resource. (1)

Access to other resources timesheet

- Depending on access rights, user can select other resource timesheet.

Selection period

- By default, the period is determined depending on the current day.
- It is possible to change the period of two ways:
  - Select year and week. (2)
  - Or select the first day of the week. (3)

Displayed timesheet

- A timesheet is displayed depends on the resource and period selection.
- The name of the resource and the week are displayed. (4)
- The days of the week are displayed. (5)
- The current day is displayed. (6)

5.1.2 Input fields

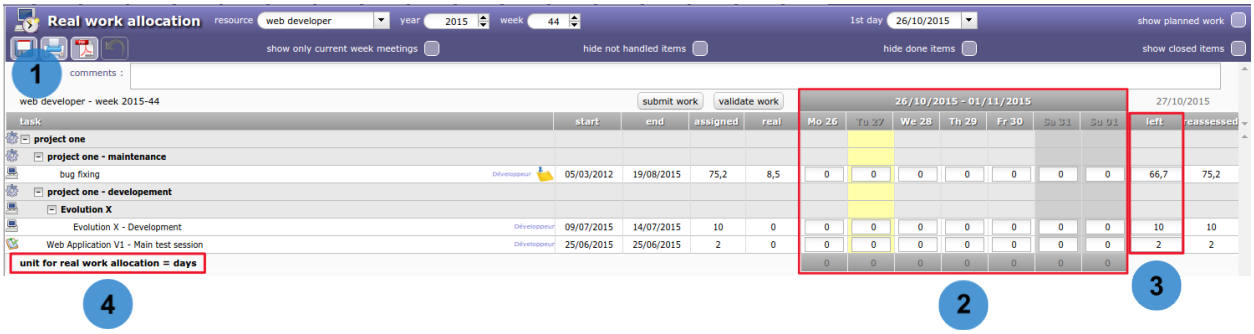

Fig. 5.5: Input timesheet zone

Comments

- A global comment can be added on the weekly follow-up. (1)

Real work entry

- Area allows to entry real work. (2)
- Week is displayed from monday to sunday.
- It possible put real work in off days.

Current day

- Columns of current day is displayed in yellow.

Days off

- Columns of days off is displayed in grey.
- Days off is determine in resource calendar definition, see: *Calendar* screen.

Left work

- Left work is automatically decreased on input of real work.
- Resources can update this data to reflect the real estimated left work. (3)

Unit for real work

- Unit for real work allocation is set *Global parameters* screen.
- Selected unit is displayed on left at bottom window (4).

5.1.3 Input entry validation

Resource capacity validation

- The total of the day is green whether entries respects the resource capacity of days.
- The total of the day is red whether entries is more than the resource capacity of days.

Resource capacity of days

- The resource capacity is defined by the number of hours per day and the resource capacity.
- The number of hours per day is defined in *Global parameters* screen.
- The capacity of the resource is defined *Resources* screen.

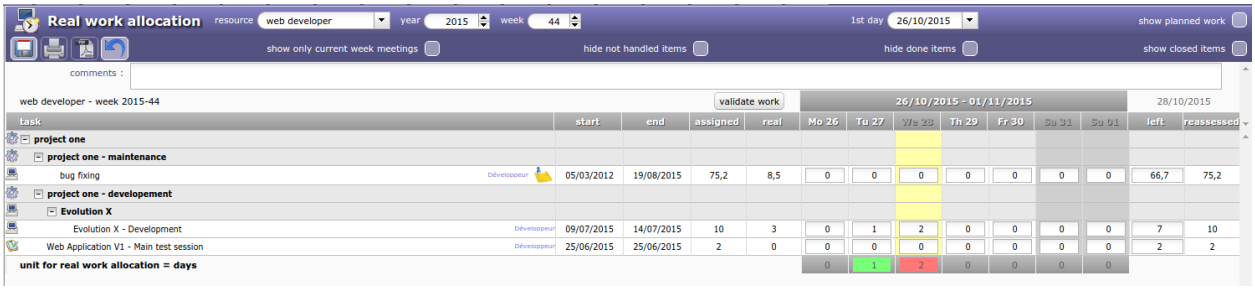

Fig. 5.6: Columns validation zone

Note:

- This control is not blocking.

Automatic status change

Status can change automatically depending on whether real work is entered or no more left work.

Automatic status change is defined in *Global parameters* screen.

Display of icons

- An icon will be displayed on the task if a status change is applicable.
- Due to real work is entered, the task status will be changed to the first 'handled' status.
- The real work is entered, but the task status will not change because at issue is occurring.
- Due to no more left work, the task status will be changed to the first 'done' status.
- No more left work, but the task status will not change because at issue is occurring.

Note:

- Move the cursor over the icon to see the message.

Common issue

- If a *responsible* or a *result* are set as mandatory in element type definition for the task. It's impossible to set those values by real work allocation screen.
- The change status must be done in treatment section on the task definition screen.

Entering real work is in excess of the number of days specified

- This alert box appears when the real work to a resource is entering ahead of time.
- The number of days in advance, resource can enter his real work is defined in "max days to book work" parameter in *Global parameters* screen.

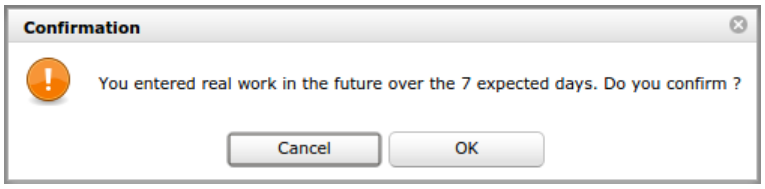

Fig. 5.7: Real work over expected days alert

CHAPTER 6

Follow-up

The main activity of Project Leader is to measure progress, analyse situation and take decisions. In order to ease his work, ProjeQtOr provides several reporting tools, from the well know Gantt chart, to many reports.

Contents

- *Today*
  - *Section: Messages*
  - *Section: Start guide*
  - *Section: Projects*
  - *Sections: Tasks*
  - *Extending section*

6.1 Today

This screen allows user to have a global view of its projects and tasks.

Note:

- This screen is the first to be displayed on each connection.
- You can define other screen will be displayed in *Users parameters* screen.

6.1.1 Section: Messages

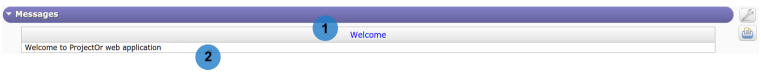

Fig. 6.1: Messages section

Messages

- Messages are displayed depends on affected project or user profile.
- Every message is component by title 1 and message 2.
- Messages are defined in *Messages* screen.

Print

- Click on to print Today screen.

Parameters

- Click on to access screen parameters.

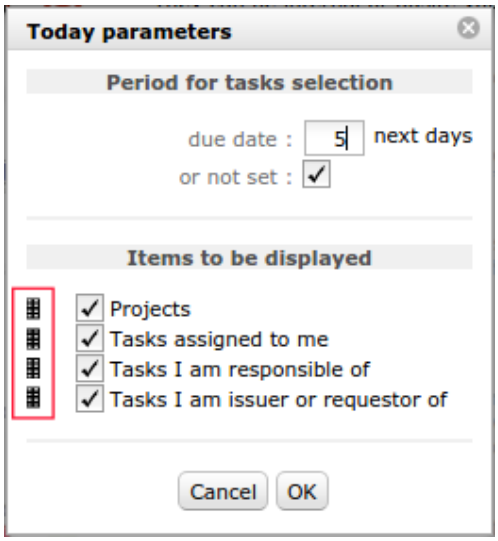

Fig. 6.2: Today parameters dialog box

Period for task selection

- Allows to define the period for tasks will be displayed.

  Field: Due date

  - Select only items with due date less than today plus this selected period.

  Field: Or not set

  - Select also items with due date not set.

Items to be displayed

- Allows to define sections displayed on the screen.

Note:

- Allows to reorder sections displayed with drag & drop feature.
- Using the selector area button icon drag .

6.1.2 Section: Start guide

- Start page for new installations to assist the administrator in the first configuration steps.
- A progress display (1) allows to determine the percent of complete installation.
- You can hide this section on startup, just unchecked (2).
  - This section will not be displayed anymore.
  - To show it again, select it as the start page in *Users parameters* screen.

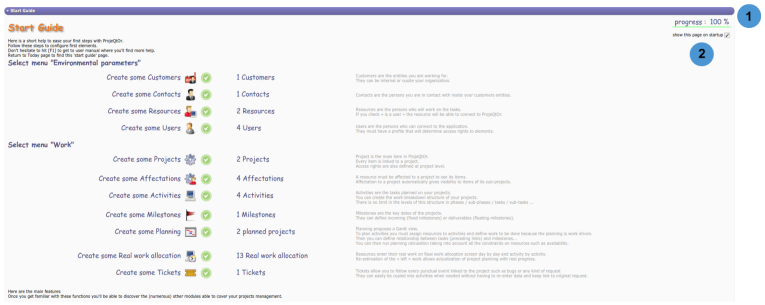

Fig. 6.3: Start guide section

6.1.3 Section: Projects

A quick overview of projects status.

The projects list is limited to the project visibility scope of the connected user.

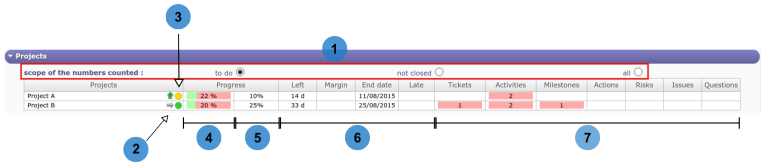

Fig. 6.4: Projects section

Scope of the numbers counted

- Checkboxes allow to filter displayed projects: 1
  - To do: Projects to do.
  - Not closed : Projects to do and done.
  - All : Projects to do, done and closed.

Projects name

- Click on the name of a project will directly move to it.

Manuel indicators

- Manuel indicator can be set on project.
- Trend and health status indicators are displayed.

  Icon: Trend 2

  - This icon allows to display the trend of the project.

  Icon: Health status 3

  - This icon allows to display the health status of the project.

Progress

- Calculated progress and overall progress are displayed.

  Calculated progress 4

  - Actual progress of the work of project.

  Note: On mouse over the bar

  - On each project shows part of "to do" (red) compared to "done and closed" (green).

  Overall progress 5

  - Additional progress manually selected for the project.

Project metrics

- Some metrics are displayed on each project. 6

Table 6.1: Fields of project metrics

Field	Description
Left	Left work for the project.
Margin	Work margin.
End date	Planified end date of the project.
Late	Number of late days in project.

Numbers of elements concerned to project

- Numbers of elements concerned to a project are displayed. 7

Note: On mouse over the bar

- On each element shows part of "to do" (red) compared to "done and closed" (green).

6.1.4 Sections: Tasks

Here are listed, as a "To do list" all the items for which the connected user is either "assigned to", "*responsible* of" or "*issuer* or *requestor* of".

Click on an item will directly move to it.

Note: Parameter: Max items to display

- Number of items listed here are limited to a value defined in *Global parameters*.

Field	Description
id	Unique Id for the item.
Project	The project concerned by the item.
Type	Type of item.
Name	Name of the item.
Due date	Planned end date or due date.
Status	Actual status of the item.
Issuer	Flag on indicate the user is the issuer for the item.
Resp.	Flag on indicate the user is the responsible for the item.

Column: Id

- Id column displayed unique Id and specific icon for the item.

6.1.5 Extending section

You can select any report to be displayed on the Today screen.

Add selected report

- To do this, just go to the selected report, select parameters and display result (to check it is what you wish on today screen).
- Click on to insert this report with parameter on the Today screen.
- Any unchanged parameter will be set as default value.
- These reports will be displayed on Today screen like other pre-defined parts.

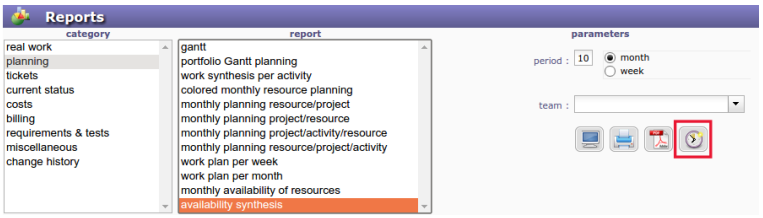

Fig. 6.5: Report selection

Manage extending section

- Click on to access screen parameters.
- You can reorder like any other parts.
- Click on to completely remove them from the list.

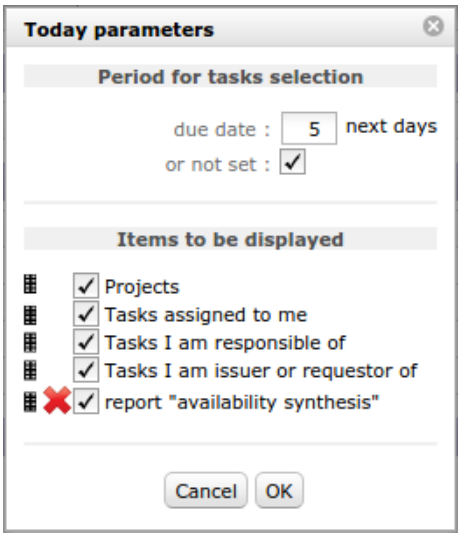

Fig. 6.6: Parameters with extending parts dialog box

Gantt

- *Gantt chart*
- *Planning*
- *Projects portfolio*
- *Resource Planning*

6.2 Gantt chart

Scale

- Scale available : daily, weekly, monthly or quater

chart detail

- Overdue tasks appear in red.

Calculate planning

6.3 Planning

Planning is displayed as a Gantt chart, showing dependencies between tasks.

Overdue tasks appear in red, others in green.

Milestones appear as squares, filled if completed, empty if not.

You can change the scale to have a daily, weekly or monthly view of the chart.

You can select to show tasks' WBS before the names.

You can select to show resource name or initials (depending on parameter) on right on tasks.

You can change the starting or ending date to display the chart.

You can also choose to save these dates to retrieve the same display on every connection.

You can select the columns displayed on the left part of the chart, except for the name of tasks (always displayed).

You can reorder columns with drag & drop on the handle in the selection list.

You can directly create a Project or an Activity or a Milestone using the create button.

The result can be printed or exported to MS-Project XML format.

Recalculate

To recalculate the planning, click on .

Calculation is not automatic.

You then have to select the project to re-calculate, and the start date for the new planning.

As WBS is taken into account for planning priority, you may wish to change tasks order.

This can simply be done with a drag & drop method on tasks, using the handle on leftmost part of the task line.

You can also increase or decrease indent of task using corresponding buttons

---

Note:

- If a resource is assigned to several projects, re-calculation for one will not impact the planning for the others, so new calculation will only use available time slots.
- Use correct resource affectation rate to manage multi-projects affectations.

Note:

- If the planning of one project must not be impacted by new calculation, you can use the "fix planning" flag on this project.
- This will avoid to change planned values for this project and its subprojects.

Planning is calculated "as simply as possible".

This means that no complex algorithm, with high level mathematic formula, is involved.

The principle is simply to reproduce what you could do on your own, with a simple Excel sheet, but automatically.

Planning is Cross-Project, through affectation rate on the projects.

All the left work is planned, from starting date, to the max date to be able to plan the work.

Calculation is executed task by task, ordering thanks to :

- dependencies (if an activity has a predecessor, the predecessor is calculated first),
- planning mode : regular between dates are planned first
- priority : the smaller values are calculated first

  if projects have different priorities, all tasks of project with smaller value priority are planned first.
- WBS : smaller WBS are planned first, so that planning is done from top to bottom of Gantt

Planning will distribute left work on future days, taking into account several constraints :

A resource has a capacity

Most of the time Capacity = 1 FTE (1 full time equivalent), but it may be more (if the resource is not a person but a team) or less (if the person work only partial time).

A resource is affected to a project, at a certain rate, possibly with start and end dates

If resources are not shared between projects, so rate will probably always be 100%.

But if resources are shared, then rate could be less than 100%. If a resource is equally shared between two projects, then each project should enter a rate of 50%. This will lead to control that planning

for each project will not overtake rate capacity, so that first project planning its activity will not take all the availability of the resource.

Project affectation capacity is controlled on a weekly basis. This means that planning for a project (including sub-projects) will not be more than (Resource Capacity) x (Resource affectation rate) x 5 for a given week.

6.4 Projects portfolio

Planning can be displayed on a projects portfolio point of view.

Only projects and milestones are displayed.

This is a good way to display projects synthesis and projects dependencies, without messing with projects activities..

It is possible to select milestones to be displayed, from none to all, or select one milestones type to display only milestones of this type

6.5 Resource Planning

Planning can be displayed on a resource basis.

One group line is displayed for each resource.

One group line can be display for projects level, depending on selection .

One line is displayed per activity. The Gantt bars for activities are hare split in two : real work in grey, planned work in green. This makes appear some planning gap between started work and planned work.

Links between activities are displayed only into the resource group. Links existing between tasks on different resources are not displayed.

Left work can be displayed on the right of task bars, using corresponding selection .

All others behaviors are similar to the task planning screen. .

6.6 Diary

Allows to display planned task to a resource on a calendar view.

This view can be monthly, weekly or daily.

Just click on any task to access directly.

Note: On mouse over the task

- You can see a short information about the task.

Day colors

- **Yellow day** : Current day
- **Grey days** : Days off

Calendar selector

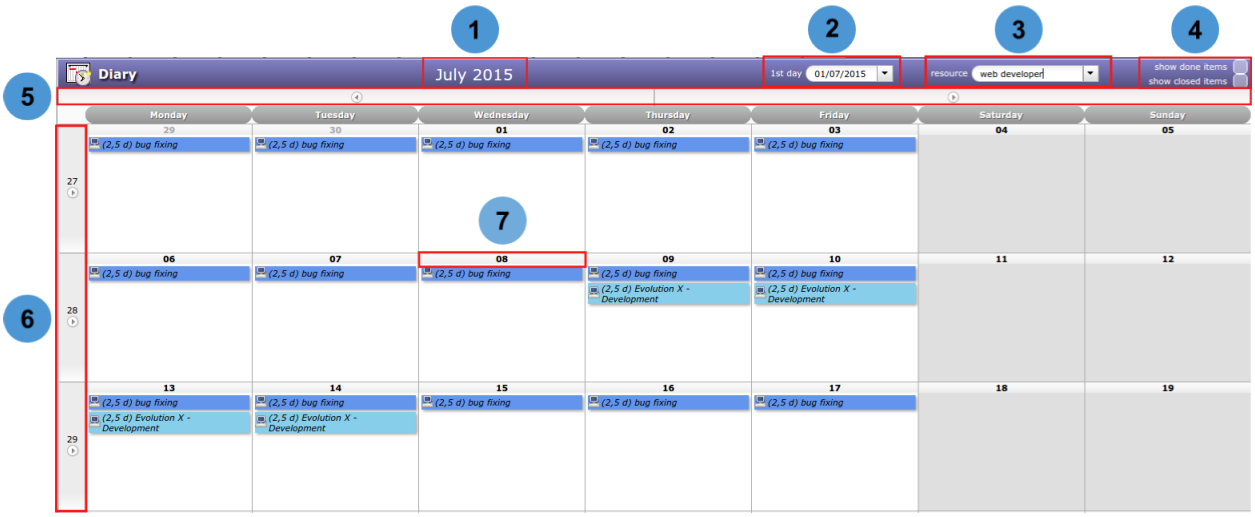

Fig. 6.7: Calendar selector

Period 1

- Display the month, week, or day.

1st day 2

- Allows to select the displayed calendar.
- The first day of mouth or the week is displayed.

Resource 3

- Allows to select the resource calendar.

Show done items & Show closed items 4

- Allows to display or not the done and closed items.

Top buttons 5

- Allows to change current month, week, or day.

Left side buttons 6

- Click on to go to week display mode.
- Click on to return to the last display mode.

Day number button 7

- Click on the day number button to go day display mode.

6.7 Reports

A list of reports is available in different categories.

1. Select a category (1), report list (2) will update.
2. Select a report in the list, this will display specific parameters (3) for the report.
3. Update the parameters to get the information you need.
4. Click on a button to produce the report. (4)

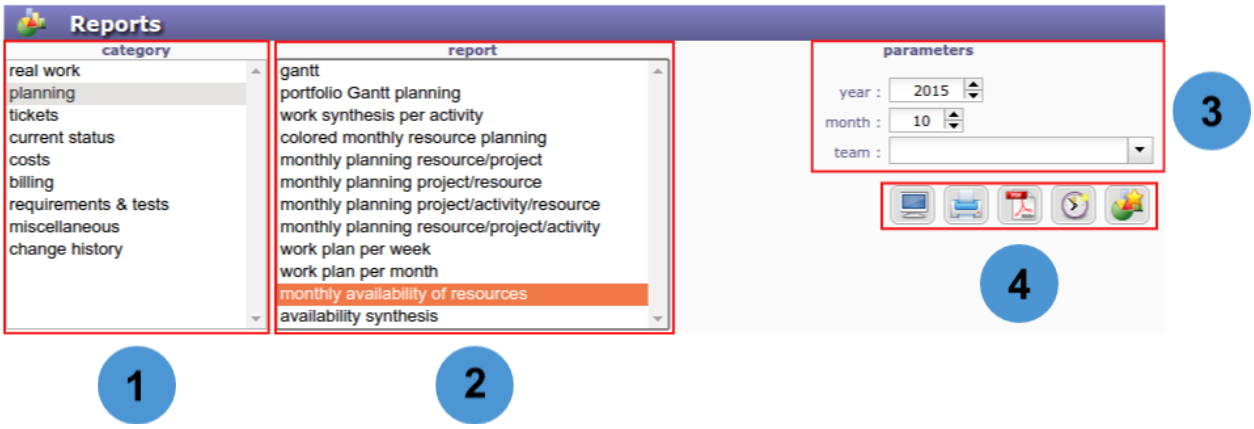

Fig. 6.8: Reports screen

Buttons

- Click on to display the report.
- Click on to get a printable version of the report.
- Click on to export the report as PDF format.
- Click on to display this report on the Today screen.
- Click on to define this report as favorite. This report will be available in favorite reports list.

6.7.1 Favorite reports

See your favorite reports when you move your cursor over the reports menu icon (in the top bar).

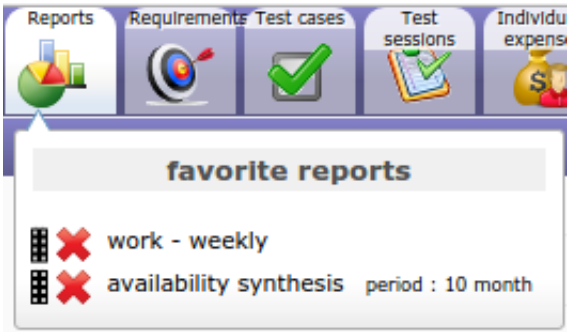

Fig. 6.9: Favorite reports tooltip

Favorite reports tooltip

- Allows to reorder reports displayed with drag & drop feature.
- Using the selector area button icon drag .
- Click on to remove the report from the list.

Direct display

Select a report to display (in print mode), without leaving the current screen.

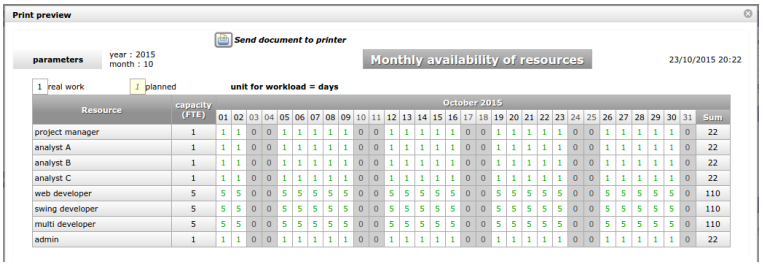

Fig. 6.10: Print preview dialog box

CHAPTER 7

Document management

ProjeQtOr integrates an easy to use Document Management feature.

7.1 Documents

A document is a referential element that gives a description of a product or a project.

A document must be linked either to a project (for project documentation), to a product (for product document) or both.

Document item describes general information about the document.

The file document will be stored in the tool as versions.

Document files storage

- Document will always refer to a directory where the file is physically stored.
- Directories are defined in *Document directories* screen.

Document versioning

- Document versioning allows to keep different version at each evolution of the document.
- Document can evolve and a new file is generated at each evolution.
- *Type of versioning* must be defined for a document.

Approval process

- You can define approvers to a document.
- When all approvers have approved the document version, it is considered as approved and then appears with a check in the list of versions.
- When creating an approver in the list, the approver is also automatically added to the latest version of the document.
- When adding a version to the document, the approvers are automatically added to the version.

Type of versioning

A document can evolve following four ways defined as versioning type :

Evolutive

- Version is a standard Vx.y format.
- It is the most commonly used versioning type.
- Major updates increase x and reset y to zero.
- Minor updates increase y.

Chronological

- Version is a date.
- This versioning type is commonly used for periodical documents.
- For instance : weekly boards.

Sequential

- Version is a sequential number.
- This versioning type is commonly used for recurring documents.
- For instance : Meeting reviews.

Custom

- Version is manually set.
- This versioning type is commonly used for external documents, when version is not managed by the tool, or when the format cannot fit any other versioning type.

Other sections

- *Linked element*
- *Notes*

Section: Description

Table 7.1: Description section fields

Field	Description
Id	Unique Id for the document.
Name	Short description of the document.
Type	Type of document.
Project	The project concerned by the document.
Product	The product concerned by the document.
Directory	Place where the document is stored to organize document structure.
Document reference	Document reference name.
External reference	External reference of the document.
Author	User or Resource or Contact who created the document.
Closed	Flag to indicate that document is archived.
Cancelled	Flag to indicate that document is cancelled.

*** Required field**

Field: Document reference

- Document reference name is calculated from format defined in the *Global parameters* screen.

Field: Author

- Positioned by default as the connected user.
- Can be changed (for instance if the author is not the current user).

Section: Versions

This section allows to manage version list of document.

Table 7.2: Version list fields

Field	Description
Versioning type	*Type of versioning* for the document.
Last version	Caption of the last version of the document.
Status	Status of the last version of the document.

*** Required field**

Version list management

- Click on ✚ to add a new version.
- Click on ✎ to modifiy a version.
- Click on ✖ to delete a version.
- Click on to download file at this version.

Note: Name of download file

- The name of download file will be the document reference name displayed in **description** section.
- If you want to preserve the uploaded file name, set the parameter in the *Global parameters* screen.

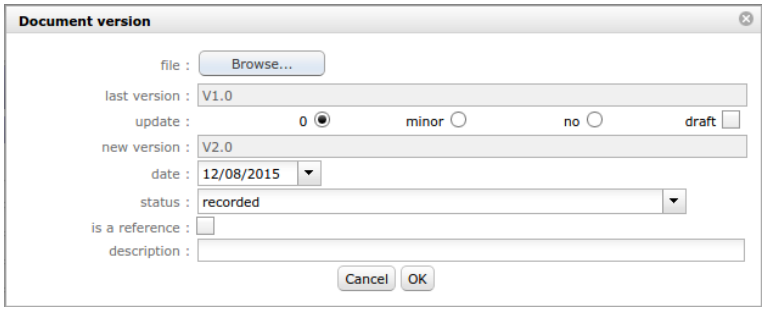

Fig. 7.1: Document version dialog box

Table 7.3: Document version dialog box fields

Field	Description
File	This button allows to upload locale file.
Last version	Caption of the last existing version.
Update	Importance of the update concerned by the new version.
New version	New caption for the created version.
Date	Date of the version.
Status	Current status of the version.
Is a reference	Flag to set that this version is the new reference of the document.
Description	Description of the version.

Field: Update

- A version can have a draft status, that may be removed afterwards.

Field: Is a reference

- Should be checked when version is validated.
- Only one version can be the reference for a document.
- Reference version is displayed in bold format in the versions list.

Field: Description

- May be used to describe updates brought by the version.
- This icon appears when the description field is filled.
- Moving the mouse over the icon will display description text.

Section: Approvers

This section allows to manage approver list of a document.

Table 7.4: Approver list fields

Field	Description
Id	Id of the approver.
Name	Name of the approver.
Status	Status of the approval of the last version of document.

Button: Approve now

- This button appears in approver list.
- Just click on the button to approve the latest version of the document.

Button: Send a reminder email to the approvers

- This button allows to send a reminder email to all the approvers who have not yet approved the document.

Approver list management

- Click on to add a new approver.
- Click on to delete the approver.

Section: Lock

This section allows to manage document locking.

Button: lock/unlock this document

- Button to lock or unlock the document to preserve it from being editing, or new version added.
- When document is locked it cannot be modified.
- Only the user who locked the document, or a user with privilege to unlock any document, can unlock it.

Document locked

- When a document is locked the following fields are displayed.

Table 7.5: Fields when the document is locked

Field	Description
Locked	Flag to indicated that the document is locked.
Locked by	User who locked the document.
Locked since	Date and time when document was locked.

CHAPTER 8

Ticket management

Contents

- *Tickets*
- *Tickets (simple)*
- *Multi-version selection*

8.1 Tickets

A ticket is a kind of task that can not be unitarily planned.

It is generally a short time activity for a single ticket, that is interesting to follow unitarily to give a feedback to the issuer or to keep trace of result.

It can be globally planned as a general activity, but not unitarily.

For instance, bugs should be managed through tickets :

- You can not plan bugs before they are registered.
- You must be able to give a feedback on each bug.
- You can (or at least should) globally plan bug fixing activity.

Planning activity

- Planning activity field allows to link the ticket with a planning activity.
- Work on the ticket will be included in this activity.

  Put the real work from tickets to the resource timesheet

  - When a resource has entered the real work on the ticket and the ticket is linked to a planning activity.
  - The resource is automatically assigned to this activity.
  - Real work set on tickets is automatically set in resource timesheet.

Restrict the entry of real work in the ticket.

- Possibility to define that only the responsible of ticket can enter real work.
- This behavior can be set in *Global parameters* screen.

Due dates

- Initial and planned due date allows to define a target date for solving the ticket.

  Initial due date

  - If a definition of ticket delay exists for giving ticket type and urgency the date is automatically calculated with this delay.
  - Else date is initialized to current day.
  - *Delays for tickets* screen allows to define ticket delay.

  Planned due date

  - Is used to define a target date after evaluation.
  - Automatically initialized to the initial due date.

  Indicators

  - Possibility to define indicators to follow the respect of dates values.
  - See: *Indicators* screen.

Version of product

- Is used to determine **original version** where the ticket has been identified and **target version** that will deliver the object of the ticket.
- Only versions of product linked with the project are available.

Multi-version selection

- Allows to select multi-version of orginal and target version.
- Is used to specify versions of product referenced to this ticket.
- See: *Multi-version selection*.

Other sections

- *Linked element*
- *Attachments*
- *Notes*

Section: Description

Table 8.1: Tickets description section fields

Field	Description
Id	Unique Id for the ticket.
Name	Short description of the ticket.
Ticket type	Type of ticket.
Project	The project concerned by the ticket.
External reference	External reference of the ticket.
Urgency	Urgency for treatment of the ticket, as requested by the issuer.
Requestor	Contact at the origin of the ticket.
Origin	Element which is the origin of the ticket.
Duplicate ticket	Link to another ticket, to link duplicate tickets.
Context	List of 3 items describing the context of the ticket.
Product	The product where ticket has been identified.
Original version	Version of product where ticket has been identified.
Description	Complete description of the ticket.

*** Required field**

Field: Context

- Contexts are initialized for IT Projects as “Environment”, “OS” and “Browser”.
- This can be easily changed values in *Contexts* screen.

Field: Original version

- Click on ✚ to add a other version, see *Multi-version selection*.

Section: Treatment

Table 8.2: Tickets treatment section fields

Field	Description
Planning activity	Activity where global work for this kind of ticket is planned.
Status	Actual *status* of the ticket.
Responsible	Resource who is responsible for the ticket.
Criticality	Importance of impact on the system, as determined after analysis.
Priority	Priority of treatment.
Initial due date	Initial target date for solving the ticket.
Planned due date	Actual target date for solving the ticket.
Estimated work	Estimated workload needed to treat the ticket.
Real work	Real workload spent to treat the ticket.
Left work	Left workload needed to finish the ticket.
Handled	Flag to indicate that ticket is taken into account.
Done	Flag to indicate that ticket has been treated.
Closed	Flag to indicate that ticket is archived.
Cancelled	Flag to indicate that ticket is cancelled.
Target version	The target version of the product that will deliver the object of the ticket.
Result	Complete description of the resolution of the ticket.

*** Required field**

Field: Priority

- Automatically calculated from Urgency and Criticality values. See: *Priority value calculation*.
- Can be changed manually.

Field: Left work

- Automatically calculated as Estimated – Real.
- Set to zero when ticket is done.

Field: Target version

- Click on ✚ to add a other version, see *Multi-version selection*.

Button: Start/End work

- This button is clock on/off timer.
- If connected user is a resource, he has the possibility to start working on the ticket.
- When work is finished, he will just have to stop the timer.

Note:

- Closing the application or starting work on another ticket will automatically stop the current ongoing work.

- The spend time will automatically be converted as real work, and transferred on planning activity if it is set (decreasing left work on the activity).

Button: Dispatch

This button allows to dispatch ticket.

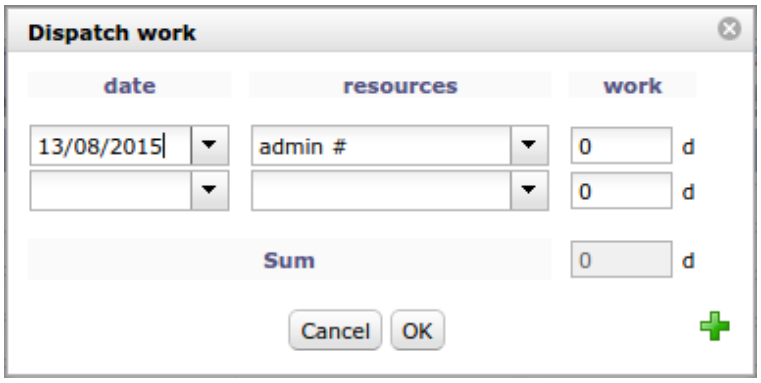

Fig. 8.1: Dispatch work dialog box

- Click on ✚ to add a line.

Table 8.3: Dispatch work dialog box fields

Field	Description
Date	Dispatch date.
Resources	Work dispatch to a resource.
Work	Planned work to this resource.

8.1.1 Priority value calculation

Priority value is automatically calculated from **Urgency** and **Criticality** values.

Priority, Urgency and Criticality values are defined in lists of values screens. See: *Priorities*, *Urgencies* and *Criticalities* screens.

In the previous screens, a name of value is set with numeric value.

Priority numeric value is determined by a simple equation as follows:

Equation

- [Priority value] = [Urgency value] X [Criticality value] / 2
- For example:
  - Critical priority (8) = Blocking (4) X Critical (8) / 2

Default values

- Default values are determined.
- You can change its values while respecting the equation defined above.

8.2 Tickets (simple)

Simple ticket is just a restricted view of Ticket, with limited write access to "Description" section, and limited view on "treatment" section.

This view is dedicated to provide access to Ticket to users who should not be able to change treatment of Tickets, such an External Team members, but can possibly create new ones.

Other sections

- *Attachments*
- *Notes*

Section: Description

Table 8.4: Simple ticket description section fields

Field	Description
Id	Unique Id for the ticket.
Name	Short description of the ticket.
Project	The project concerned by the ticket.
Urgency	Urgency for treatment of the ticket, as requested by the issuer.
Context	List of 3 items describing the context of the ticket.
Version	Version of product where ticket has been identified.
Description	Complete description of the ticket.

*** Required field**

Field: Context

- Contexts are initialized for IT Projects as "Environment", "OS" and "Browser".
- This can be easily changed values in *Contexts* screen.

Field: Version

- Click on ✚ to add a other version, see *Multi-version selection*.

Section: Treatment

Table 8.5: Simple ticket treatment section fields

Field	Description
Status	Actual *status* of the ticket.
Responsible	Resource who is responsible for the ticket.
Due date	Actual target date for solving the ticket.
Handled	Flag to indicate that ticket is taken into account.
Done	Flag to indicate that ticket has been treated.
Closed	Flag to indicate that ticket is archived.
Cancelled	Flag to indicate that ticket is cancelled.
Target version	The target version of the product that will deliver the object of the ticket.
Result	Complete description of the resolution of the ticket.

*** Required field**

Note:

- Except for status, all these fields are "readonly" and can only be updated through the Ticket view.

8.3 Multi-version selection

For version fields, it possible to set multi version of product.

Main and other version

- The version with smaller id will appear in the select list and is considered as the main version.
- Other versions are listed above.
- It is possible to set an 'other' version as the main version using the button .

- Click on to add a other version.
- Click on to delete a version.

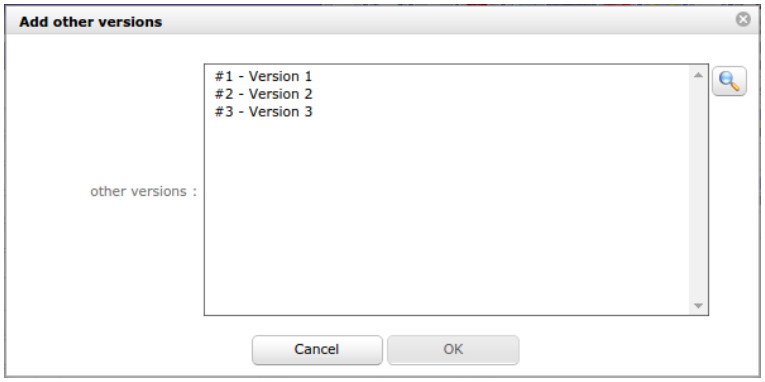

Fig. 8.2: Add other version dialog box

CHAPTER 9

Requirements et Tests

Contents

- *Requirements*
- *Test cases*
- *Test sessions*
- *Summary of test cases section*

9.1 Requirements

Requirement is a rule that must be defined to a product or a project. It can be applied to both.

In most IT projects, requirement can be a functional rule for a software.

It allows to define and monitor cost and delays.

It can be linked to test cases, it's used to describe how you will test that a given requirement.

Target version

- A given version of the product can be defined, meaning the rule is valid at this version.

Rights management

- Linking requirements to a project will limit the visibility, respecting rights management at project level.

Requirement link to test cases

- Test cases can be linked to a requirement in **linked element section**.
- Linking a requirement to a test case will display a summary of test case run (defined in test session).
- This way, you will have an instant display of test coverage for the requirement.

Requirement link to tickets

- When test case run status is set to **failed**, the reference to a ticket must be defined (reference to the incident).
- When the requirement is linked to a test case with this run status, ticket is automatically linked to the requirement.

Initial and planned due dates

- Possibility to define indicators to follow the respect of dates values.
- See: *Indicators* screen.

Predecessor and successor elements

- Requirements can have predecessors and successors.
- This defines some dependencies on the requirements.
- The dependencies don't have specific effects. It is just an information.

Other sections

- *Predecessor and Sucessor element*
- *Summary of test cases*
- *Linked element*
- *Attachments*
- *Notes*

Section: Description

Table 9.1: Description section fields

Field	Description
Id	Unique Id for the requirement.
Name	Short description of the requirement.
Requirement type	Type of requirement.
Project	The project concerned by the requirement.
Product	The product concerned by the requirement.
External reference	External reference for the requirement.
Requestor	Contact who requested the requirement.
Origin	Element which is the origin of the requirement.
Urgency	Urgency of implementation of the requirement.
Initial due date	Initial due date.
Planned due date	Planned due date.
Description	Long description of the requirement.

*** Required field**

Fields: Project and Product

- Project or product must be set.
- You can set both.

Section: Treatment

Table 9.2: Treatment section fields

Field	Description
Top requirement	Parent requirement, defining a hierarchic structure.
Status	Actual *status* of the requirement.
Responsible	Resource who is responsible for the requirement.
Criticality	Level of criticality of the requirement for the product.
Feasibility	Result of first analysis to check the feasibility of the implementation of the requirement.
Technical risk	Result of first analysis to measure the technical risk of the implementation of the requirement.
Estimated effort	Result of first analysis to measure the estimated effort of the implementation of the requirement.
Handled	Flag to indicate that requirement is taken into account.
Done	Flag to indicate that requirement has been treated.
Closed	Flag to indicate that requirement is archived.
Cancelled	Flag to indicate that requirement is cancelled.
Target version	Version of the product where the requirement will be active.
Result	Description of the implementation of the requirement.

*** Required field**

Section: Lock

A requirement can be locked to ensure that its definition has not changed during the implementation process.

Button: Lock/Unlock requirement

- Button to lock or unlock the requirement to preserve it from being changed.
- Only the user who locked the requirement or a habilitated user can unlock a requirement.

Requirement locked

- When a requirement is locked the following fields are displayed.

Table 9.3: Fields when the requirement is locked

Field	Description
Locked	Flag to indicated that the requirement is locked.
Locked by	User who locked the requirement.
Locked since	Date and time when the requirement was locked.

9.2 Test cases

Test cases are elementary actions executed to test a requirement.

You may define several tests to check a requirement, or check several requirements with one test.

Test case must be defined to a product or a project. It can be applied to both.

Product version

- A given version of the product can be defined, meaning the test case is valid at this version.

Rights management

- Linking test case to a project will limit the visibility, respecting rights management at project level.

Predecessor and successor elements

- Test case can have predecessors and successors.
- This defines some dependencies on the test case.
- Dependencies don't have specific effects. It is just an information.

Other sections

- *Predecessor and Sucessor element*
- *Linked element*
- *Attachments*
- *Notes*

Section: Description

Table 9.4: Description section fields

Field	Description
Id	Unique Id for the test case.
Name	Short description of the test case.
Test type	Type of test case.
Project	The project concerned by the test case.
Product	The product concerned by the test case.
Product version	Version of the product where the test case will be valid.
External reference	External reference for the test case.
Environment	List of 3 items describing the context of the test case.
Description	Complete description of the test case.

*** Required field**

Fields: Project and Product

- Project or product must be set.
- You can set both.

Field: Environment (Context)

- Contexts are initialized for IT Projects as "Environment", "OS" and "Browser".
- This can be easily changed values in *Contexts* screen.

Field: Description

- The description of test case should describe the steps to run the test.

Section: Treatment

Table 9.5: Treatment section fields

Field	Description
Parent test case	Parent test case, defining a hierarchic structure for test cases.
Status	Actual *status* of the requirement.
Responsible	Resource who is responsible of the test case.
Priority	Level of priority for the test case.
Handled	Flag to indicate that test case is taken into account.
Done	Flag to indicate that test case has been treated.
Closed	Flag to indicate that test case is archived.
Cancelled	Flag to indicate that test case is cancelled.
Prerequisite	List of steps that must be performed before running the test.
Expected result	Description of expected result of the test.
Summary	*Summary of test case run status*.

*** Required field**

Field: Prerequisite

- If left blank and test case has a parent, parent prerequisite will automatically be copied here.

Section: Test case runs

- This section allows to display a complete list of test case runs.
- These are links of the test to test sessions.
- This list also displays the current status of the test in the sessions.

Note:

- To go, click on the corresponding test session.

Table 9.6: Test case runs list fields

Field	Description
Test session	Composed of session type, Id and description.
Status	Current status of the test case run in the test session.

9.3 Test sessions

A test session defines all the tests to be executed to reach a given target.

Define in the test case runs all test cases will be running to this test session.

For each test case run sets the status of test results.

Test case run status Test case run status is:

- **Planned:** Test to be executed.
- **Passed:** Test passed with success (result is conform to expected result).
- **Blocked:** Impossible to run the test because of a prior incident (blocking incident or incident on preceding test) or missing prerequisite.
- **Failed:** Test has returned wrong result.

Note:

- When status is set to failed, the reference to a ticket must be defined (reference to the incident).
- The referenced ticket is automatically added in linked element.

Test session must be defined to a product or a project. It can be applied to both.

Product version

- A given version of the product can be defined, meaning the test session is valid at this version.

Rights management

- Linking test session to a project will limit the visibility, respecting rights management at project level.

Planning element

- A test session is a planning element like activity.
- A test session is a task in a project planning.
- Allows to assigned resource and follow up progress.

Predecessor and successor elements

- Test sessions can have predecessors and successors.
- This defines some dependencies on test cases or planning constraints.

Other sections

- *Assignment*
- *Progress*
- *Summary of test cases*
- *Predecessor and Sucessor element*
- *Linked element*
- *Attachments*
- *Notes*

Section: Description

Table 9.7: Description section fields

Field	Description
Id	Unique Id for the test session.
Name	Short description of the test session.
Session type	Type of test session.
Project	The project concerned by the test session.
Product	The product concerned by the test session.
Product version	Version of the product where the test session will be valid.
External reference	External reference for the test session.
Description	Complete description of the test session.

*** Required field**

Fields: Project and Product

- Project or product must be set.
- You can set both.

Section: Treatment

Table 9.8: Treatment section fields

Field	Description
Parent activity	Parent activity, to define hierarchic position in the Gantt.
Parent session	Parent session, to define session of sessions.
Status	Actual *status* of the test session.
Responsible	Resource who is responsible of the test session.
Handled	Flag to indicate that test session is taken into account.
Done	Flag to indicate that test session has been treated.
Closed	Flag to indicate that test session is archived.
Cancelled	Flag to indicate that test session is cancelled.
Result	Summary result of the test session.

*** Required field**

Section: Test case runs

This section allows to manage test case runs.

Table 9.9: Test case runs list fields

Field	Description
Test case	Information about test case (type, Id and name).
Detail	Detail of test case.
Status	Status of test case run.

Field: Test case

- This icon appears when the test case run comment field is filled.
- Moving the mouse over the icon will display the test case run comments.

Field: Detail

- Moving the mouse over the icon will display the test case description.
- Moving the mouse over the icon will display the test case expected result.
- Moving the mouse over the icon will display the test case prerequisite.

Field: Status

- If status of test case run is **failed**, information about selected ticket is displayed too.

Manage test case runs list

- Click on ✚ to add a test case run. A **Test case run dialog box** will be appear.
- Click on ✎ to edit a test case run. A **Test case run detail dialog box** will be appear.
- Click on ✖ to remove a test case run.
- Click on ✔ to mark test case run as passed.
- Click on ✖ to mark test case run as failed.
- Click on STOP to mark test case run as blocked.

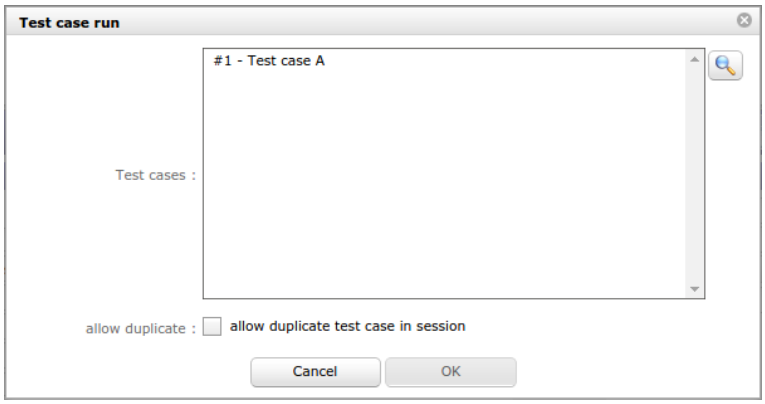

Fig. 9.1: Test case run dialog box

Table 9.10: Test case run dialog box fields

Field	Description
Test cases	Test cases list.
Allow duplicate	Flag on if you permit that test case is use more one time in a test session.

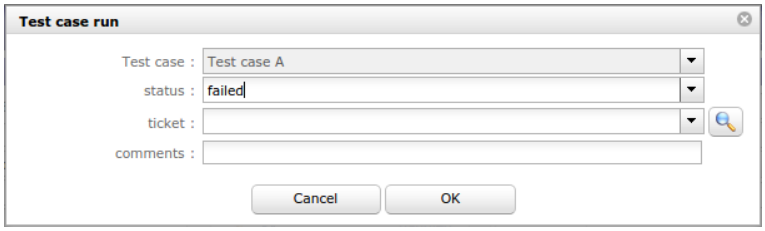

Fig. 9.2: Test case run detail dialog box

Table 9.11: Test case run detail dialog box fields

Field	Description
Test case	Selected test case.
Status	List of *test case run status*.
Ticket	List of ticket.
Comments	Comments of test case run.

Field: Ticket

- Field appear only whether status of test case run is **failed**.

9.4 Summary of test cases section

This section summarizes the status of test case runs to requirement and test session.

Requirement

- This section summarizes the status of test case runs for test cases are linked to the requirement.

Field: Total

- Because a test case can be linked to several test sessions, total can be greater than linked to the requirement.

Test session

- This section summarizes the status of test case runs in the test session.

Summary of test case run status

- **Not planned:** No test case planned.
- **Planned:** No test failed or blocked, at least one test planned.
- **Passed:** All tests passed.
- **Failed:** At least one test failed.
- **Blocked:** No test failed, at least one test blocked.

Table 9.12: Summary of test cases fields

Field	Description
Total	Number of test case runs whatever the status.
Planned	Number of test case runs with the status **Planned**.
Passed	Number of test case runs with the status **Passed**.
Blocked	Number of test case runs with the status **Blocked**.
Failed	Number of test case runs with the status **Failed**.
Summary	*Summary of test case run status*.
Issues	Number of tickets linked to the requirement or the test session.

Note:

- Percent to each status is displayed.

CHAPTER 10

Financial

Expense

- *Individual expense*
- *Project expense*
- *Expense detail lines*

10.1 Individual expense

An individual expense stores information about individual costs, such as travel costs or else.

Individual expense has detail listing for all items of expense.

This can for instance be used to detail all the expense on one month so that each user opens only one individual expense per month (per project), or detail all the elements of a travel expense.

Planned amount

Planned amount will help to have an overview of project total costs, even before expense is realized.

Other sections

- *Expense detail lines*
- *Linked element*
- *Attachments*
- *Notes*

Section: Description

Field	Description
Id	Unique Id for the expense.
Name	Short description of the expense.
Type	Type of expense.
Resource	Resource concerned by the expense.
Project	The project concerned by the expense.
Description	Complete description of the expense.

*** Required field**

Section: Treatment

Field	Description
Status	Actual *status* of the expense.
Planned date	Planned date of the expense.
Planned amount	Planned amount of the expense.
Real date	Real date of the expense.
Real amount	Real amount of the expense.
Closed	Flag to indicate that expense is archived.
Cancelled	Flag to indicate that expense is cancelled.

*** Required field**

Fields: Planned date and amount

- When planned date or planned amount is set, other must also be set.

Fields: Real date and amount

- When real date or real amount is set, other must also be set.

Field: Real amount

- If detail lines are entered, real amount is automatically calculated as sum of detail amounts, and is then locked.

10.2 Project expense

A project expense stores information about project costs that are not resource costs.

This can be used for all kinds of project cost :

- Machines (rent or buy).
- Softwares.
- Office.
- Any logistic item.

Planned amount

Planned amount will help to have an overview of project total costs, even before expense is realized.

Other sections

- *Expense detail lines*
- *Linked element*
- *Attachments*
- *Notes*

Section: Description

Field	Description
Id	Unique Id for the expense.
Name	Short description of the expense.
Type	Type of expense.
Project	The project concerned by the expense.
Description	Complete description of the expense.

*** Required field**

Section: Treatment

Field	Description
Status	Actual *status* of the expense.
Planned date	Planned date of the expense.
Planned amount	Planned amount of the expense.
Real date	Real date of the expense.
Real amount	Real amount of the expense.
Closed	Flag to indicate that expense is archived.
Cancelled	Flag to indicate that expense is cancelled.

*** Required field**

Fields: Planned date and amount

- When planned date or planned amount is set, other must also be set.

Fields: Real date and amount

- When real date or real amount is set, other must also be set.

10.3 Expense detail lines

Section: Expense detail lines

This section is common to individual and project expenses.

It allows to enter detail on expense line.

Fields: Real amount and date

- When a line is entered, expense real amount is automatically updated to sum of lines amount.
- Real date is set with the date in the firts detail line.

Field	Description
Date	Date of the detail line.
Name	Name of the detail line.
Type	Type of expense.
Detail	Detail depends on the type of expense.
Amount	Amount of the detail line.

Detail lines management

- Click on ✚ to add a detail line.
- Click on ✎ to modify an existing detail line.
- Click on ✖ to delete the detail line.

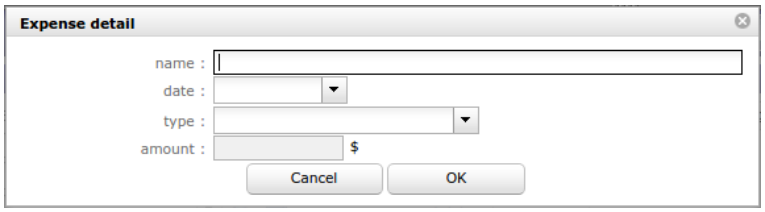

Fig. 10.1: Expense detail dialog box

Table 10.1: Fields of expense detail dialog box

Field	Description
Name	Name of the detail.
Date	Date of the detail.
Type	Type of expense.
Amount	Amount of the detail.

Field: Date

- This allows to input several items, during several days, for the same expense, to have for instance one expense per travel or per month.

Field: Type

- Depending on type, new fields will appear to help calculate of amount.
- Available types depending on whether individual or project expense.
- See: *Expenses details types*.

Field: Amount

- Automatically calculated from fields depending on type.
- May also be input for type "justified expense".

Quotation and Order

- *Quotations*
- *Orders*

10.4 Quotations

A quotation is a proposal estimate sent to customer to get approval of what's to be done, and how must the customer will pay for it.

On the quotation form, you can record all the information about the sent proposal, including attaching some file completely describing the proposal with details terms and conditions.

Transform quotation to order

- A quotation can be copied into an order when corresponding document is received as customer agreement.

Bill lines section

- This section allows to detail the quotation modality.

Other sections

- *Bill lines*
- *Linked element*
- *Attachments*
- *Notes*

Section: Description

Field	Description
Id	Unique Id for the quotation.
Name	Short description of the quotation.
Quotation type	Type of quotation.
Project	The project concerned by the quotation.
Origin	Element which is the origin of the quotation.
Customer	Customer concerned by the quotation.
Contact	Contact in customer organization to whom you sent the quotation.
Request	Request description.
Additional info.	Any additional information about the quotation.

*** Required field**

Field: Customer

- Automatically updated from project field.

Section: Treatment

Field	Description
Status	Actual *status* of the quotation.
Responsible	Resource who is responsible for the quotation.
Sent date	Date when quotation is sent to customer contact.
Send mode	Delivery mode.
Offer validity	Limit date of the validity of the proposal.
Likelihood	The probability that the proposal will be accepted.
Handled	Flag to indicate that quotation is taken into account.
Done	Flag to indicate that quotation is done (execution processed).
Closed	Flag to indicate that quotation is archived.
Cancelled	Flag to indicate that quotation is cancelled.
Planned end date	Target end date of the activity object of the quotation.
Activity type	Type of the activity object of the quotation.
Payment deadline	The payment deadline is stated on the quotation.
Amount	Total amount of the quotation.
Estimated work	Work days corresponding to the quotation.
Comments	Comment about the treatment of the quotation.

*** Required field**

Fields: Amount

Columns:

- **Ex VAT**: Amount without taxes.
- **Tax**: Applicable tax.
- **Full**: Amount with taxes.

Column: Ex VAT

- The column value is automatically updated with the sum of bill line amounts.

Hint: Activity type

- The activity should be created only after approval.

10.5 Orders

An order (also called command) is the trigger to start work.

On the order form, you can record all the information of the received order.

Work on the activity

- An order can be linked to an activity. It then represents the command of the work on the activity.
- In that case, validated work of the activity is the sum of the orders linked to the activity.

Bill lines section

- This section allows to detail the order modality.

Other sections

- *Bill lines*
- *Linked element*
- *Attachments*
- *Notes*

Section: Description

Field	Description
Id	Unique Id for the order.
Name	Short description of the order.
Order type	Type of order.
Project	The project concerned by the order.
Customer	Customer concerned by the order.
Contact	Contact in customer organization to whom you sent the order.
External reference	*External reference* of the order (as received).
Submitted date	Date when order is sent to customer.
Receive mode	Delivery mode.
Origin	Element which is the origin of the order.
Description	Complete description of the order.
Additional info.	Any additional information about the order.

*** Required field**

Field: Customer

- Automatically updated from project field.

Section: Treatment

Field	Description
Status	Actual *status* of the order.
Responsible	Resource who is responsible for the order.
Handled	Flag to indicate that order is taken into account.
Done	Flag to indicate that order is done (execution processed).
Closed	Flag to indicate that order is archived.
Cancelled	Flag to indicate that order is cancelled.
Activity type	Type of the activity object of the order.
Linked activity	Activity representing the execution of the order.
Initial	Initial values.
Amendment	Additional values.
Total	Sum of the initial values and amendment.
Start date	Initial start date of the execution of the order.
End date	Initial and validated end date of the execution of the order.
Comments	Comment about the treatment of the order.

*** Required field**

Fields: Initial, Amendment and Total

Columns:

- **Ex VAT**: Amount without taxes.
  - The column value is automatically updated with the sum of bill line amounts.
- **Tax**: Applicable tax.
- **Full**: Amount with taxes.
- **Work**: Work days corresponding to the order.
  - The column value is automatically updated with the sum of bill lines quantities.
  - When the measure unit is “day”.

Field: Amendment

- The columns values “Ex VAT” and “Work” are automatically updated with the sum of billing lines with selected amendment checkboxes.

Fields: Start and end date

- **Initial** : Initial dates
- **Validated** : Validated dates

Hint: Activity type

- The activity should be created only after approval.

Bill

- *Bills*
- *Terms*
- *Activities prices*
- *Payments*

10.6 Bills

A bill is a request for payment for delivered work.

Billing will depend on billing type defined for the project.

Billing types

Each bill is linked to project, a project has a project type, and a project type is linked to a billing type.

So the billing type is automatically defined for the selected project.

Billing type will influence bill line format.

At terms

- A *term* must be defined to generate the bill, generally following a billing calendar.
- Used for instance for: **Fixed price projects**.

On produced work

- No term is needed.
- The billing will be calculated based on produced work for resources on selected *activities*, on a selected period.
- Used, for instance for: **Time & Materials projects**.

On capped produced work

- No term is needed.
- The billing will be calculated based on produced work for resources on selected *activities*, on a selected period.
- Used, for instance for: **Capped Time & Materials projects**.

Note:

- Taking into account that total billing cannot be more than project validated work.

Manual

- Billing is defined manually, with no link to the project activity.
- Used, for instance for: **Any kind of project where no link to activity is needed**.

Not billed

- No billing is possible for these kinds of projects.
- Used, for instance for: **Internal projects & Administrative projects**.

Other sections

- *Linked element*
- *Attachments*
- *Notes*

Section: Description

Field	Description
Id	Unique Id for the bill.
Name	Short description of the bill.
Bill type	Type of bill.
Project	The project concerned by the bill.
Date	Date of the bill.
Payment deadline	Payment deadline.
Payment due date	Due date for payment (read only).
Customer	Customer who will pay for the bill.
Bill contact	Contact who will receive the bill.
Recipient	Recipient who will receive the payment for the bill.
Origin	Element which is the origin of the bill.
Billing type	Project billing type.

*** Required field**

Field: Payment due date

- The value is calculated with date of bill + payment deadline.

Fields: Customer & Bill contact

- Automatically updated from project fields.

Section: Treatment

Field	Description
Status	Actual *status* of the bill.
Responsible	Resource who is responsible for the bill.
Sent date	Date when bill is sent to customer contact.
Send mode	Delivery mode.
Done	Flag to indicate that the bill has been treated.
Closed	Flag to indicate that the bill is archived.
Cancelled	Flag to indicate that the bill is cancelled.
Amount	Total amount of the bill.
% of order	Percentage of the bill balance over order amount.
Payment	Payment of bill.
Comments	Comments for the bill.

*** Required field**

Fields: Amount

Columns:

- **Ex VAT**: Amount without taxes.
  - The value is automatically updated with the sum of bill line amounts.
- **Tax**: Applicable tax.
  - Automatically updated from customer field.
- **Full**: Amount with taxes.

Fields: Payment

Columns:

- **Date**: Date of payment.
- **Amount**: Payment amount.
- **Complete**: Flag to indicate that complete payment.

Section: Bill lines

Input for each bill line depends on billing type.

Field	Description
Id	Unique Id for the bill line.
N°	Number of the line for the bill.
Description	Description of the line.
Detail	Detail of the line.
Unit price	Unitary price of billed element.
Quantity	Quantity of billed element.
Sum	Total price for the line (Price x Quantity).

Bill lines management

- Click on to add a bill line. A different “Bill line” dialog box will be displayed depends on billing type.
- Click on to modify an existing bill line.
- Click on to delete the bill line.

Bill line: At terms

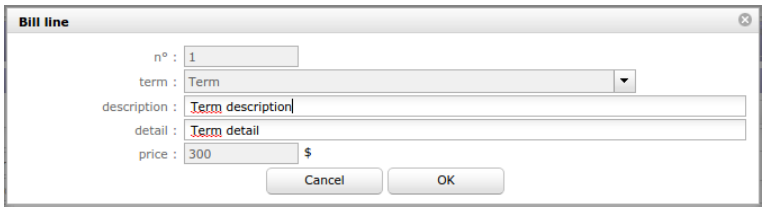

Fig. 10.2: Bill line dialog box - At terms

Table 10.2: Fields of bill line dialog box - At terms

Field	Description
N°	Number of the line for the bill.
Term	Project terms to be selected.
Description	Description of line.
Detail	Detail of the line.
Price	Real amount of term.

*** Required field**

Field: Description

- Automatically set with the term name.
- Can be modified on update.

Field: Detail

- Can be set on update.

Bill line: On produced work & On capped produced work

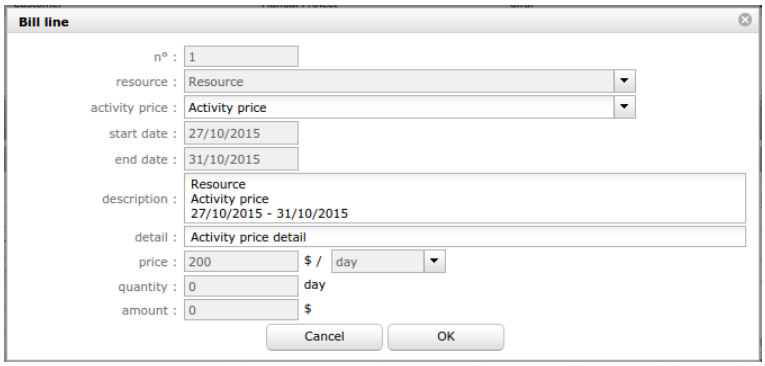

Fig. 10.3: Bill line dialog box - On produced work & On capped produced work

Table 10.3: Fields of bill line dialog box - On produced work & On capped produced work

Field	Description
N°	Number of the line for the bill.
Resource	Project resources to be selected.
Activity price	Project activities price to be selected.
Start date	Start date of the period to take into account.
End date	End date of the period to take into account.
Description	Description of line.
Detail	Detail of the line.
Price	Price of the activity.
Quantity	Quantity of element.
Amount	Amount for the line (Price x Quantity).

*** Required field**

Field: Description

- Automatically set with selected resource, activity price name and dates.
- Can be modified on update.

Field: Detail

- Can be set on update.

Bill line: Manual billing

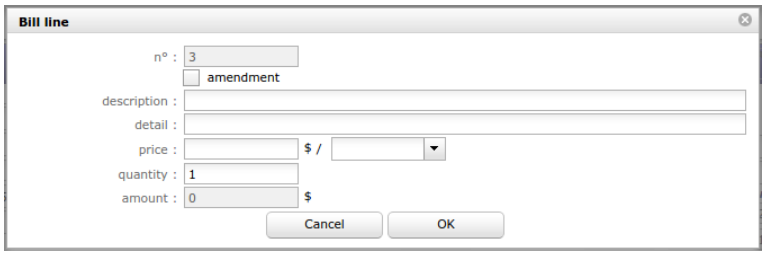

Fig. 10.4: Bill line dialog box - Manual billing

Table 10.4: Fields of bill line dialog box - Manual billing

Field	Description
N°	Number of the line.
Amendment	Flag to indicate this is an amendment line.
Description	Description of the line.
Detail	Detail of the line.
Price	Unitary price of element / measure unit.
Quantity	Quantity of element.
Amount	Amount for the line (Price x Quantity).

Field: Amendment

- This field is used for amendment values in order detail.

10.7 Terms

A term is a planned trigger for billing.

You can define as many terms as you wish, to define the billing calendar.

Note:

- Terms are mandatory to bill "Fixed price" project.
- A term can be used just one time. The bill name will be displayed.

A term has triggers

- You can link the activities that should be billed at this term.
- A summary of activities is displayed for validated and planned amount and end date.
- Validated and planned values play the role of reminder.
- You can use these values to set real amount and date.

Other sections

- *Notes*

Section: Description

Field	Description
Id	Unique Id for the term.
Name	Short description of the term.
Project	The project concerned with the term.
Bill	Bill name that uses this term.
Closed	Flag to indicate that term is archived

*** Required field**

Section: Fixed price for term

Field	Description
Real amount	Defined amount for the term.
Real date	Defined date for the term.
Validated amount	Sum of validated amounts of activities defined as triggers **(Read only)**.
Validated date	Max of validated end dates of activities defined as triggers **(Read only)**.
Planned amount	Sum of planned amounts of activities defined as triggers **(Read only)**.
Planned date	Max of validated end dates of activities defined as triggers **(Read only)**.

Fields: Amount and Date (Planned & Validated)

- When a trigger is entered, the values of planned and validated are automatically updated with the sum and the max of triggered amounts.

Section: Trigger elements for the term

This section allows to manage element trigger.

Trigger element management

- Click on ✚ to add an element trigger.
- Click on ✖ to delete an element trigger.

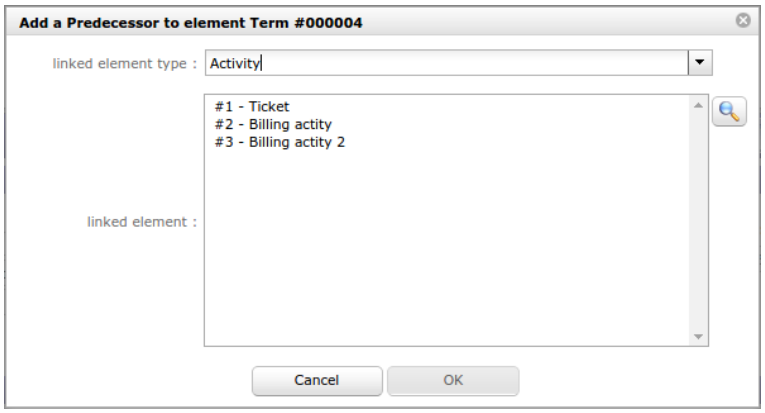

Fig. 10.5: Add a trigger element to term dialog box

Table 10.5: Fields of add a trigger element to term dialog box

Field	Description
Linked element type	Type of element to be selected (Activity, Meeting, Milestone, Project, Test session).
Linked element	Item to be selected.

10.8 Activities prices

Activity price defines daily price for activities of a given **activity type** and a given **project**.

This is used to calculate a billing amount for billing type **On produced work** and **On capped produced work**.

Section: Description

Field	Description
Id	Unique Id for the activity price.
Name	Short description of the activity price.
Project	The project concerned with the activity price.
Activity type	Type of activities concerned with the activity price.
Price of the activity	Daily price of the activities of the given activity type and the given project.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate that activity price is archived.

*** Required field**

10.9 Payments

Allow to define payment of bills.

The bill keeps track of payment.

Section: Description

Field	Description
Id	Unique Id for the payment.
Name	Short description of the payment.
Payment type	Type of payment.
Description	Description of the payment.

*** Required field**

Section: Treatment

Field	Description
Payment mode	The mode of payment.
Payment date	Date of payment.
Payment amount	Amount of the payment.
Payment fee	Payment of the fee.
Payment credit	Balance of payment amount less payment fee.
Bill	Bill concerned with the payment.
Bill reference	Reference of bill.
Customer	Customer of bill.
Recipient	Recipient of bill.
Bill amount	Amount of bill.
Closed	Flag to indicate that payment is archived.

*** Required field**

CHAPTER 11

Risk & Issue Management

Contents

- *Risks*
- *Opportunities*
- *Criticality value calculation*
- *Issues*
- *Actions*

11.1 Risks

A risk is any threat of an event that may have a negative impact to the project, and which may be neutralized, or at least minimized, through pre-defined actions.

The risk management plan is a key point to project management :

- Identify risks and estimate their severity and likelihood.
- Identify mitigating actions.
- Identify opportunities.
- Follow-up actions.
- Identify risks that finally occur (becoming an issue).

Initial and planned end dates

- Possibility to define indicators to follow the respect of dates values.
- See: *Indicators* screen.

Other sections

- *Linked element*
- *Attachments*
- *Notes*

Section: Description

Field	Description
Id	Unique Id for the risk.
Name	Short description of the risk.
Type	Type of risk.
Project	The project concerned by the risk.
Severity	Level of importance of the impact for the project.
Likelihood	Probability level of the risk to occur.
Criticality	Global evaluation level of the risk.
Cost of impact	Impact cost of the risk.
Project reserved cost	The reserve amount according to the risk likelihood.
Origin	Element which is the origin of the risk.
Cause	Description of the event that may trigger the risk.
Impact	Description of the estimated impact on the project if the risk occurs.
Description	Complete description of the risk.

*** Required field**

Field: Criticality

- Automatically calculated from Severity and Likelihood values. See: *Criticality value calculation*.
- Value can be changed.

Field: Project reserved cost

- Automatically calculated from the percentage defined to the likelihood.

Section: Treatment

Field	Description
Status	Actual *status* of the risk.
Responsible	Resource who is responsible for the treatment of the risk.
Priority	Expected priority to take into account this risk.
Initial end date	Initially expected end date of the risk.
Planned end date	Updated end date of the risk.
Handled	Flag to indicate that risk is taken into account.
Done	Flag to indicate that risk has been treated.
Closed	Flag to indicate that risk is archived.
Cancelled	Flag to indicate that risk is cancelled.
Result	Complete description of the treatment done on the risk.

*** Required field**

11.2 Opportunities

An opportunity can be seen as a positive risk. It is not a threat but the opportunity to have a positive impact to the project.

The risk management plan is a key point to project management :

- Identify risks and estimate their severity and likelihood.
- Identify mitigating actions.
- Identify opportunities.
- Follow-up actions.
- Identify risks that finally occur (becoming an issue).

Other sections

- *Linked element*
- *Attachments*
- *Notes*

Section: Description

Field	Description
Id	Unique Id for the opportunity.
Name	Short description of the opportunity.
Type	Type of opportunity.
Project	The project concerned by the opportunity.
Significance	Level of importance of the impact for the project.
Likelihood	Evaluation of the estimated improvement, or positive impact, on the project of the opportunity.
Criticality	Global evaluation level of the opportunity.
Expected improvement	Expected amount of the opportunity.
Project reserved gain	The estimated gain, according to the opportunity likelihood.
Origin	Element which is the origin of the opportunity.
Opportunity source	Description of the event that may trigger the opportunity.
Impact	Description of the estimated positive impact on the project.
Description	Complete description of the opportunity.

*** Required field**

Field: Criticality

- Automatically calculated from Significance and Likelihood values. See: *Criticality value calculation*.
- Value can be changed.

Field: Project reserved gain

- Automatically calculated from the percentage defined to the likelihood.

Section: Treatment

Field	Description
Status	Actual *status* of the opportunity.
Responsible	Resource who is responsible for the opportunity.
Priority	Expected priority to take into account this opportunity.
Initial end date	Initially expected end date of the opportunity.
Planned end date	Updated end date of the opportunity.
Handled	Flag to indicate that opportunity is taken into account.
Done	Flag to indicate that opportunity has been treated.
Closed	Flag to indicate that opportunity is archived.
Cancelled	Flag to indicate that opportunity is cancelled.
Result	Complete description of the treatment of the opportunity.

*** Required field**

11.3 Criticality value calculation

Criticality value is automatically calculated from **Severity (Significance)** and **Likelihood** values.

Criticality, Severity (Significance) and Likelihood values are defined in lists of values screens. See: *Criticalities*, *Severities* and *Likelihoods* screens.

In the previous screens, a name of value is set with numeric value.

Criticality numeric value is determined by a simple equation as follows:

Equation

- [Criticality value] = [Severity value] X [Likelihood value] / 2
- For example:
  - Critical (8) = High (4) X High (4) / 2

Default values

- Default values are determined.
- You can change its values while respecting the equation defined above.

11.4 Issues

An issue is a problem that occurs during the project.

If the risk Management plan has been correctly managed, issues should always be occurring identified risks.

Actions must be defined to solve the issue.

Initial and planned end dates

- Possibility to define indicators to follow the respect of dates values.
- See: *Indicators* screen.

Other sections

- *Linked element*
- *Attachments*
- *Notes*

Section: Description

Field	Description
Id	Unique Id for the issue.
Name	Short description of the issue.
Type	Type of issue.
Project	The project concerned by the issue.
Criticality	Level of importance of the impact for the project.
Priority	Priority requested to the treatment of the issue.
Origin	Element which is the origin of the issue.
Cause	Description of the event that led to the issue.
Impact	Description of the impact of the issue on the project.
Description	Complete description of the issue.

*** Required field**

Section: Treatment

Field	Description
Status	Actual *status* of the issue.
Responsible	Resource who is responsible for the issue.
Initial end date	Initially expected end date of the issue.
Planned end date	Updated end date of the issue.
Handled	Flag to indicate that issue is taken into account.
Done	Flag to indicate that issue has been treated.
Closed	Flag to indicate that issue is archived.
Cancelled	Flag to indicate that issue is cancelled.
Result	Complete description of the treatment of the issue.

*** Required field**

11.5 Actions

An action is a task or activity that is set-up in order to :

- Reduce the likelihood of a risk
- or reduce the impact of a risk
- or solve an issue
- or build a post-meeting action plan
- or just define a “to do list”.

The actions are the main activities of the risk management plan.

They must be regularly followed-up.

Initial and planned due dates

- Possibility to define indicators to follow the respect of dates values.
- See: *Indicators* screen.

Other sections

- *Linked element*
- *Attachments*
- *Notes*

Section: Description

Field	Description
Id	Unique Id for the action.
Name	Short description of the action.
Action type	Type of action.
Project	The project concerned by the action.
Priority	Priority requested to the treatment of the action.
Description	Complete description of the action.

*** Required field**

Section: Treatment

Field	Description
Status	Actual *status* of the action.
Responsible	Resource who is responsible for the action.
Initial end date	Initially expected end date of the action.
Planned end date	Updated end date of the action.
Handled	Flag to indicate that action is taken into account.
Done	Flag to indicate that action has been treated.
Closed	Flag to indicate that action is archived.
Cancelled	Flag to indicate that action is cancelled.
Efficiency	Evaluation of the efficiency the action had on the objective (for instance on the risk mitigation).
Result	Complete description of the treatment of the action.

*** Required field**

CHAPTER 12

Review logs

Contents

- *Meetings*
- *Periodic meetings*
- *Attendees section*
- *Progress section*
- *Decisions*
- *Questions*

12.1 Meetings

Meeting items are stored to keep track of important meetings during the project lifecycle :

- Progress Meetings
- Steering committees
- Functional workshops

In fact, you should keep track of every meeting where decisions are taken, or questions answered.

This will provide an easy way to find back when, where and why a decision has been taken.

Project activity

- Meeting is a project activity.
- You can assign project resources (named attendees).
- You have progress section that allows for followed resources work and cost.

Other sections

- *Attendees*
- *Progress*
- *Predecessor and Sucessor element*
- *Linked element*
- *Attachments*
- *Notes*

Section: Description

Table 12.1: Description section fields

Field	Description
Id	Unique Id for the meeting.
Name	Short description of the meeting.
Meeting type	Type of meeting.
Project	The project concerned by the meeting.
Meeting date	Date of the meeting (initially expected date), including start and end time.
Location	Place (room or else) when meeting will stand.
Description	Description of the meeting.

*** Required field**

Field: Name

- If not set, will automatically be set to meeting type completed with meeting date.

Hint: Description can be used to store agenda.

Button: Email invitation

- Allows to send the email to attendees.
- They will receive the invitation in their calendar management tool.

Section: Treatment

Table 12.2: Treatment section fields

Field	Description
Parent activity	Parent activity of the meeting.
Status	Actual *status* of the meeting.
Responsible	Resource who is responsible for the organization of the meeting.
Handled	Flag to indicate that meeting has been taken into account.
Done	Flag to indicate that meeting has been held.
Closed	Flag to indicate that meeting is archived.
Cancelled	Flag to indicate that meeting is cancelled.
Minutes	Minutes of the meeting.

*** Required field**

Field: Parent activity

- In the WBS structure, under which the meeting will be displayed in the Gantt planning.

Minutes

- You can enter here only a short summary of the minutes and attach the full minutes as a file.

12.2 Periodic meetings

Periodic meeting is a way to define some meetings that will occur on a regular basis.

Note:

- Most fields fit meeting fields, but some information for the meeting is not present for periodic meetings, such as Minutes or Status.
- It is because these fields won't be set through periodic meeting definition, but must be set directly on the meetings.

Periodic meeting process

- When saving periodic meeting, elementary meetings are automatically created.
- Changes can then be done in elementary meetings. In most cases, these changes won't be erased by periodic meeting updates.

Update on a periodic meeting

- On each update of a periodic meeting, meetings are re-evaluated.
- This may lead to deletion of some meetings.
- This will also reposition meetings, even if their planned dates were elementary updated.

Attendees assignment

- Attendees can be defined on a periodic meeting.
- They will be copied on the elementary meetings.
- The periodic meetings will not be planned, only elementary meetings will be.
- So left work will always be set to zero on periodic meetings.

Other sections

- *Attendees*
- *Progress*
- *Predecessor and Sucessor element*
- *Notes*

Section: Description

Table 12.3: Description section fields

Field	Description
Id	Unique Id for the periodic meeting.
Name	Short description of the meeting.
Meeting type	Type of meeting.
Project	The project concerned by the meeting.
Location	Place (room or else) when meeting will stand.
Description	Description of the meeting. Can be used to store Agenda.

*** Required field**

Field: Name

- If not set, will automatically be set to meeting type completed with meeting date.

Section: Treatment

Table 12.4: Treatment section fields

Field	Description
Parent activity	Parent activity of the meeting.
Responsible	Resource who is responsible for the organization of the meeting.
Closed	Flag to indicate that periodic meeting is archived.

Field: Parent activity

- In the WBS structure, under which the meeting will be displayed in the Gantt planning.

Section: Periodicity

Table 12.5: Periodicity section fields

Field	Description
Period	Start date and end date or number of occurrences to define the range of the periodicity.
Time	Start and end time for all the meetings.
Periodicity	Frequency of the meeting, on proposed bases (daily, weekly monthly).
Only on open days	Specify that meetings will not be set on off days.

*** Required field**

Field: Periodicity

- Several periodicity is proposed:
  - Every day
  - Same day every week
  - Same day every mouth
  - Same week every mounth

12.3 Attendees section

This section allows to define the list of attendees to the meeting.

Attendee list

- Meeting is an activity you can assign project resources.
- A possibility to assign work to some attendees (project resources). So meeting works of these attendees are booked in the project.
- More detail about how assigned project resources, see: *Assignment* section.

Other attendees

- Extra list of persons attending (or expecting to attend) the meeting, in completion to resource in the attendee list.

Attendees entry

- You can enter attendees by email address, resource or contact name, user name or initial without caring about.
- Just separate attendees with commas or semicolons.

Note:

- Duplicate email addresses in the attendee list will automatically be removed.

12.4 Progress section

This section is common to meeting and periodic meeting.

It allows to follow-up the progress of a meeting.

Table 12.6: Progress section fields

Field	Description
Validated work/cost	Committed work/cost, work/cost of the meeting should not be more.
Assigned work/cost	Work/cost for the assignments on the meeting.
Real work/cost	Work/cost really spent on the meeting.
Left work/cost	Work/cost needed to complete the meeting.

Priority

- *Planning priority* of the meeting.

12.5 Decisions

Decisions are stored to keep track of important decisions, when, where and why the decision was taken.

You can link a decision to a meeting to rapidly find the minutes where the decision is described.

Other sections

- *Linked element*
- *Attachments*
- *Notes*

Section: Description

Table 12.7: Description section fields

Field	Description
Id	Unique Id for the decision.
Name	Short description of the decision.
Decision type	Type of decision.
Project	The project concerned by the decision.
Description	Complete description of the decision.

*** Required field**

Section: Validation

Table 12.8: Validation section fields

Field	Description
Status	Actual *status* of the decision.
Decision date	Date of the decision.
Origin	Origin of the decision.
Accountable	Resource accountable for the decision.
Closed	Flag to indicate that decision is archived.
Cancelled	Flag to indicate that decision is cancelled.

*** Required field**

Field: Origin

- It can be either the reference to a meeting where the decision was taken (so also add the reference to the meetings list), or a short description of why the decision was taken.

Field: Accountable

- The person who took the decision.

12.6 Questions

Question are stored to keep track of important questions and answers.

In fact, you should keep trace of every question and answer that have an impact to the project.

The questions can also afford an easy way to track questions sent and follow-up non-answered ones.

This will provide an easy way to find back when, who and precise description of the answer to a question.

Also keep in mind that some people will (consciously or not) be able to change their mind and uphold it has always been their opinion. . .

You can link a question to a meeting to rapidly find the minutes where the question was raised or answered.

Initial and planned due dates

- Possibility to define indicators to follow the respect of dates values.
- See: *Indicators* screen.

Other sections

- *Linked element*
- *Attachments*
- *Notes*

Section: Description

Table 12.9: Description section fields

Field	Description
Id	Unique Id for the question.
Name	Short description of the question.
Question type	Type of question.
Project	The project concerned by the question.
Description	Complete description of the question.

*** Required field**

Section: Answer

Table 12.10: Answer section fields

Field	Description
Status	Actual *status* of the decision.
Responsible	Resource who is responsible for the follow-up of the question.
Initial due date	Initially expected date for the answer to the question.
Planned due date	Updated expected date for the answer to the question.
Replier	Name of the person who provided the answer.
Handled	Flag to indicate that question has been taken into account.
Done	Flag to indicate that question has been answered.
Closed	Flag to indicate that question is archived.
Cancelled	Flag to indicate that question is cancelled.
Response	Complete description of the answer to the question.

*** Required field**

CHAPTER 13

Environmental parameters

Contents

- *Products*
- *Versions*

13.1 Products

Product is the element a project is built for.

A project works on one or more versions of the product .

A product is any element delivered by the project. For IT/IS projects, products are generally applications.

Other sections

- *Attachments*
- *Notes*

Section: Description

Table 13.1: Description section fields

Field	Description
Id	Unique Id for the product.
Name	Name of the product.
Designation	Trade name of the product known outside the company.
Customer	The customer the product should be delivered to.
Prime contractor	The contact, into customer organization, who will be responsible for the product delivery.
Is sub-product of	Name of the top product if this product is a sub-product.
Closed	Flag to indicate that product is archived.
Description	Complete description of the product.

*** Required field**

Section: Product versions

List of the versions defined for the product.

13.2 Versions

Version is the declination of the product life.

A project works on one or more versions of the product .

A version of product is any stable status of the element delivered by the project.

For IT/IS projects, versions are generally applications versions.

Other sections

- *Attachments*
- *Notes*

Section: Description

Table 13.2: Description section fields

Field	Description
Id	Unique Id for the version.
Product	The product on which the version applies.
Name	Name of the version.
Prime contractor	The contact, into customer organization, who will be responsible for the version delivery.
Responsible	Resource responsible of the version.
Entry into service	Initial, planned and real entry into service date of the version.
End date	Initial, planned and real end dates of the version.
Description	Complete description of the version.

*** Required field**

Field: Prime contractor

- Can be different from product prime contractor.

Field: Entry into service

- Done is checked when real is set.

Field: End date

- Done is checked when real is set, corresponding to closed version.

Section: Projects linked to this version

Projects can be directly linked to version.

Link version to projects management

- Click on ✚ to create a new link to project.
- Click on to update an existing link to project.
- Click on ✖ to delete the corresponding link to project.

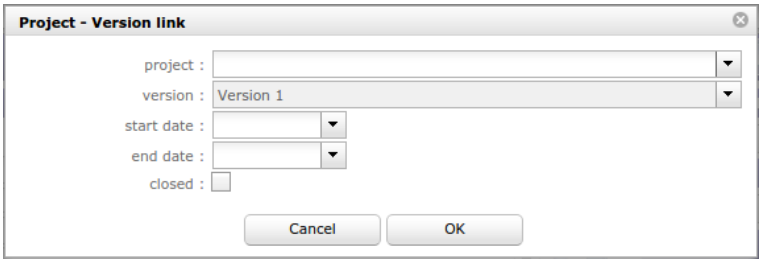

Fig. 13.1: Project - Version link dialog box

Table 13.3: Project - Version link dialog box fields

Field	Description
Project	Project linked to the version.
Version	Current version.
Start date	Start date for validity of the link.
End date	End date for validity of the link.
Closed	Flag to indicate that link is not active any more, without deleting it.

13.3 Affectations

Concepts

- *Profiles definition*
- *Stakeholder definition*
- *Project affectation*

Allows to manage project affectations.

Offers a global view of affectation.

Hint:

- You can use filters.

Section: Description

Field	Description
Id	Unique Id for the affectation.
Resource	Name of the affected resource.
Or contact	Name of the affected contact.
Profile	Selected profile.
Project	Project affected to.
Rate	Affectation rate for the project (%).
Start date	Start date of affectation.
End date	End date of affectation.
Closed	Flag to indicate that the affectation is archived.
Description	Complete description of the affectation.

*** Required field**

Fields: Resource & Contact

- You can select resource or contact.
- If none is selected then the user connected is used to define the affectation.
- If a contact is a resource and inversely, then resource or contact name will be selected too.

13.4 Users

Concepts

- *ProjeQtOr roles*
- *Profiles definition*
- *Stakeholder definition*
- *Photo*

The user is a person that will be able to connect to the application.

Note:

- To be able to connect, the user must have a password and a user profile defined.

ProjeQtOr and LDAP users

- ProjeQtOr offers two modes of authentication.

  ProjeQtOr users

  - Users' information is kept in the application database.
  - Password policy and login behavior are managed by the application (Defined in *Global parameters* screen).
  - The users "admin" and "guest" are created during installation.

  LDAP users

  - Allows users defined in an external directory to login at ProjeQtOr by the LDAP protocol.
  - Users' information and password policy are managed in the external directory.
  - LDAP protocol parameters are set in *Global parameters* screen.

Default user profile

- A general user profile can be set during user creation.
- A different default profile can be set for ProjeQtOr and LDAP users.

Web Service

- ProjeQtOr provides an API to interact with its elements. It is provided as REST Web Service.
- An API key is defined for the user.
- This API key is used to encrypt the data for methods: PUT, PUSH and DELETE.

Other sections

- *Affectations*

Section: Description

Table 13.4: Users description section fields

Field	Description
Id	Unique Id for the user.
Photo	Photo of the user.
User name	login id of the user.
Real name	Name of the user.
Initials	Initials of the user.
Email address	Email address of the user.
Profile	Profile of the user.
Locked	Flag used to lock the user, to prohibit connections.
Is a contact	Is this user also a contact?
Is a resource	Is this user also a resource?
Closed	Flag to indicate that user is archived.
Description	Complete description of the user.

*** Required field**

Field: User name

- The user name must be unique.

Field: Is a contact

- Check this if you want created a contact to this user.
- This user will then appear in the "Contact" list

Field: Is a resource

- Check this if you want created a resource to this user.
- The user will then also appear in the "Resources" list.

Section: Miscellanous

Button: Reset password

- This button allows to reset password to default password.
- Default password value is defined in *Global parameters* screen.
- Reset password button is available only for ProjeQtOr users.

Table 13.5: Users miscellaneous section fields

Field	Description
Don't receive team mails	Flag to indicate that the user don't want to receive team mails.
Comes from LDAP	Flag to indicate that the user come from LDAP.
API key	Key string used by web service consumer.

Button: Send information to the user

- This button allows to send by email to the user the login information.

Contents

- *Resources*
- *Teams*
- *Calendar*

13.5 Resources

Concepts

- *ProjeQtOr roles*
- *Profiles definition*
- *Stakeholder definition*
- *Photo*
- *Resource calendar*

Human and material resource are involved in the project.

Project affectation defines its availability.

As group of person

- A resource can be a group of person.
- Useful in initial project planning.
- You create the fictitious resource with capacity > 1.

Example

- If you want a group of three peoples then resource capacity must be set to 3.

Other sections

- *Affectations*

Section: Description

Table 13.6: Resources description section fields

Field	Description
Id	Unique Id for the resource.
Photo	Photo of the resource.
Real name	Name of the resource.
User name	Name of user.
Initials	Initials of the resource.
Email address	Email address of the resource.
Profile	Profile of the user.
Capacity (FTE)	Capacity of the resource, in Full Time Equivalent.
Calendar	*Calendar* defines the availability of the resource.
Team	The team to which the resource belongs.
Phone	Phone number of the resource.
Mobile	Mobile phone number of the resource.
Fax	Fax number of the resource.
Is a contact	Is this resource also a contact?
Is a user	Is this resource also a user?
Closed	Flag to indicate that the resource is archived.
Description	Complete description of the resource.

*** Required field**

Field: Capacity (FTE)

- 1 (full time).
- < 1 (for part time working resource).
- > 1 (for virtual resource or teams, to use for instance to initialize a planning).

Field: Is a contact

- Check this if the resource must also be a contact.
- The resource will then also appear in the “Contacts” list.

Field: Is a user

- Check this if the resource must connect to the application.
- You must then define the **User name** and **Profile** fields.
- The resource will then also appear in the “Users” list.

Section: Function and cost

Concepts

- *Resource function and cost*

This section allows to define functions and cost of the resource.

Table 13.7: Function and cost section fields

Field	Description
Function	Function of the resource for the selected cost.
Cost	Daily cost of the resource for the selected function.
Start date	Start date for the cost of the resource, for the selected function.
End date	End date for the cost of the resource, for the selected function.

Field: End date

- The end date is set when a new resource cost is defined in the same function.
- The end date is the day before the start date in the new resource cost entry.

Resource cost management

- Click on ✚ to create a new resource cost.
- Click on to update an existing resource cost.
- Click on ✖ to delete the resource cost.

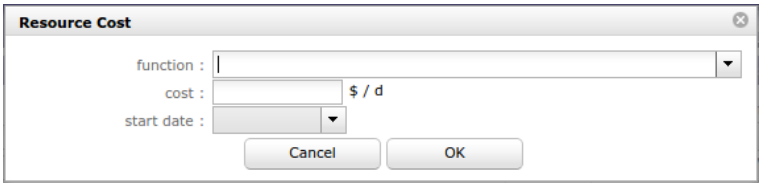

Fig. 13.2: Resource cost dialog box

Table 13.8: Resource cost dialog box fields

Field	Description
Function	Function to be selected.
Cost	Daily cost of the resource for the selected function.
Start date	Start date for the cost of the resource, for the selected function.

Field: Function

- The resource main function will be displayed first.

Field: Start date

- Start date must be set when a new resource cost is created for the same function.

Section: Miscellanous

Table 13.9: Miscellanous section fields

Field	Description
Don't receive team mails	Flag to indicate that resource don't want to receive team mails.

13.6 Teams

The team is a group of resources gathered on any criteria.

Note:

- A resource can belong to only one team.

Use for

- To affect all team members of a project.
- To filter resource data in work, cost and planning reports.
- To set attachment, note and document visibility to the team.

Section: Description

Table 13.10: Description section fields

Field	Description
Id	Unique Id for the team.
Name	Name of the team.
Closed	Flag to indicate that team is archived.
Description	Complete description of the team.

Section: Team members

- List of the resources members of the team.

Button: Affect all team members of a project

- This button allows to affect all team members of a project.
- The *affectation dialog box* will be displayed.

13.7 Calendar

Concepts

- *Resource calendar*

This tool allows to define calendars.

How it works

- It allows to define exceptions to the default definition.
- In default definition, week days are days work and weekend days are days off.

Note:

- Exceptions can be defined for the current year and the next years.

Default calendar

- A calendar named "default" is already defined.
- By default, this is the calendar of all resources.
- Days off defined in this calendar is displayed in Gantt, real work allocation and diary.
- It cannot be deleted.

Specific calendar

- A specific calendar can be created to define days off and work to a resource.
- Days off defined in this calendar is displayed in real work allocation and diary.

Import calendar definition

- It is possible to import exceptions definition of a calendar in another.
- Existing exceptions of current calendar are not changed.

Note:

- The calendars are not linked.
- You have to re import the definition to apply changes.

Section: Description

Table 13.11: Description section fields

Field	Description
Id	Unique Id for the calendar.
Name	Name of the calendar.

Section: Year

Field : Year field

- Select year of displayed calendar.

Button : Import this year from calendar

- Copy exceptions of the selected year of the selected calendar into current calendar.

Section: Calendar days

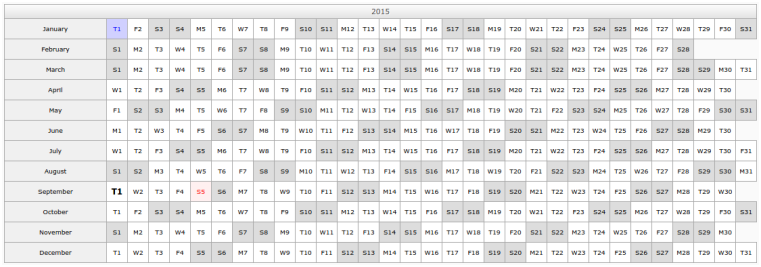

Fig. 13.3: Year calendar

A calendar of selected year is displayed to give a global overview of the exceptions existing.

- In white, days work.
- In gray, days off.
- In red, exception days work.
- In blue, exception days off.
- In bold, current day.

Just click on one day in the calendar to switch between off and work day.

Contents

- *Customers*
- *Contacts*

13.8 Customers

The customer is the entity for which the project is set.

It is generally the owner of the project, and in many cases it is the payer.

It can be an internal entity, into the same enterprise, or a different enterprise, or the entity of an enterprise.

The customer defined here is not a person. Real persons into a customer entity are called "Contacts".

Other sections

- *Attachments*
- *Notes*

Section: Description

Field	Description
Id	Unique Id for the customer.
Customer name	Short name of the customer.
Type of customer	Type of customer.
Customer code	Code of the customer.
Payment deadline	The payment deadline is stated on the bill for this customer.
Tax	Tax rates that are applied to bill amounts for this customer.
Tax number	Tax reference number, to be displayed on the bill.
Closed	Flag to indicate that the customer is archived.
Description	Complete description of the customer.

*** Required field**

Section: Address

- Full address of the customer.

Section: Projects

- List of the projects of the customer.

Section: Contacts

- List of the contacts known in the entity of the customer.

13.9 Contacts

Concepts

- *ProjeQtOr roles*
- *Profiles definition*
- *Stakeholder definition*
- *Photo*

A contact is a person in a business relationship with the company.

The company keeps all information data to be able to contact him when needed.

A contact can be a person in the customer organization.

A contact can be the contact person for contracts, sales and billing.

Other sections

- *Affectations*

Section: Description

Field	Description
Id	Unique Id for the contact.
Photo	Photo of the contact.
Real name	Name of the contact.
User name	Name of user.
Initials	Initials of the contact.
Email address	Email address of the contact.
Profile	Profile of the user.
Customer	The customer the contact belongs to.
Function	Function of contact.
Phone	Phone number of the contact.
Mobile	Mobile phone number of the contact.
Fax	Fax number of the contact.
Is a resource	Is this contact also a resource ?
Is a user	Is this contact also a user ?
Closed	Flag to indicate that contact is archived.
Description	Complete description of the contact.

*** Required field**

Field: Is a resource

- Check this if the contact must also be a resource.
- The contact will then also appear in the “Resources” list.

Field: Is a user

- Check this if the contact must connect to the application.
- You must then define the **User name** and **Profile** fields.
- The contact will then also appear in the "Users" list.

Section: Address

Full address of the contact.

Section: Miscellanous

Field	Description
Don't receive team mails	Flag to indicate that resource don't want to receive team mails.

13.10 Recipients

The recipient is the beneficiary of bill payments.

Recipients are mainly defined to store billing information.

Section: Description

Field	Description
Id	Unique Id for the recipient.
Name	Short name of the recipient.
Company number	Company number, to be displayed on the bill.
Legal notice	Legal notice for the recipient.
Tax number	Tax reference number, to be displayed on the bill.
Tax free	Flag to indicate that tax is automatically set to zero for this recipient.
Contact name	Name of contact for the recipient.
Contact email	Email of contact for the recipient.
Contact phone	Phone of contact for the recipient.
Closed	Flag to indicate that the recipient is archived.

*** Required field**

Section: International Bank Account Number

Field	Description
Bank	Bank name.
International number (IBAN)	IBAN for the recipient.
Bank code (BIC)	BIC for the recipient.
National account number	Full account number defining the BBAN account code.

Section: Address

- Full address of the recipient.

13.11 Contexts

The contexts defines a list of elements selectable to define ticket context and test case environment.

Contexts are initially set to be able to define contexts for IT Projects, for three context types :

- Environment
- Operating System
- Browser

They can be changed to be adapted to any kind of project.

Section: Description

Field	Description
Id	Unique Id for the context.
Context type	One of the three context type.
Name	Name of the context.
Sort order	Number to define the order of display in lists
Closed	Flag to indicate that the context is archived.

*** Required field**

Fields: Context type

- The list is fixed.
- Captions are translated and so can be changed in language file.

13.12 Document directories

Document directories management allows to define a structure for document storage.

- The files of document will be stored in the folder defined by the parameters «Document root» and «Location».
- «Document root» is defined in *Global parameters* screen.

Section: Description

Field	Description
Id	Unique Id for the directory.
Name	Name of the directory.
Parent directory	Name of the parent directory to define hierarchic structure.
Location	Folder where files will be stored.
Project	Directory is dedicated to this project.
Product	Directory is dedicated to this product.
Default type	Type of document the directory is dedicated to.
Closed	Flag to indicate that directory is archived.

*** Required field**

Field: Parent directory

- The current directory is then a sub-directory of parent.

Field: Location

- Location is automatically defined as «Parent directory» / «Name».

Field: Project

- This project will be the default to new stored documents in this directory.

Field: Product

- This product will be the default to new stored documents in this directory.

Field: Default type

- This document type will be the default to new stored documents in this directory.

CHAPTER 14

Tools

Contents

- *Emails sent*
- *Alerts*
- *Messages*
- *Import data*
  - *File format*
  - *Data import process*
- *Automatic import*

14.1 Emails sent

Users can have a look at the list of the automatic emails sent.

All the information about the email, including the status showing whether the email was correctly sent or not.

14.2 Alerts

Users can have a look at the alerts sent.

By default, administrators can see all the alerts sent, and other users only see their own alerts.

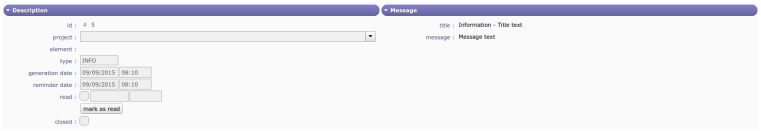

Fig. 14.1: Alert screen

Button: Mark as read

- The button is available if the user alert is not tagged “read” yet.

14.3 Messages

Concepts

- *Profiles definition*

You can define some message that will be displayed on the *Today* screen of users.

Optionally, the message can be shown on login screen.

You can limit the display to some profile and project.

The message will be displayed in a color depending on the message type.

Section: Description

Table 14.1: Message description section fields

Field	Description
Id	Unique Id for the message.
Title	Header of the message.
Message type	Type of message.
Profile	The profile of users who will see the message.
Project	The project to limit display.
Show on login screen	Show this message on login screen.
Closed	Flag to indicate that the message is archived.

*** Required field**

Field: Project

- Only resources affected to the project will see the message.

Section: Message

Table 14.2: Message message section fields

Field	Description
Message	Complete text of the message.

14.4 Import data

Imports data from CSV or XLSX files.

How to do

1. Select the element type from the list.
2. Select file format (CSV or XLSX).
3. Select the file.
4. Click on **Import data** button to start importing.

Report of the import

- Data that is not imported because not recognized as a field appear in grey text in the result table.
- Data that are voluntarily not imported (because must be calculated) appear in blue text in the result table.

Note: Import users

- The password field must be cut and pasted from the database because it is encrypted.
- If you enter some readable password, the users will not be able to connect.

Attention:

- If you want to create new users **don't put any id** because if id already exists, it will be overridden by the new (with possibility to erase admin user. . .).
- Always keep in mind that your import may have some impact on administrator user.
- So be sure to keep an operational admin access.

14.4.1 File format

The content of the imported file must fit the element type description.

To know the data that may be imported, click on the button.

Names of columns

- The first line of the file must contain the name of the fields.

Note:

- Names of columns can contain spaces (to have better readability).
- The spaces will be removed to get the name of the column.

Hint:

- Look into the model class. The names are the same.

Date format

- Dates are expected in format "YYYY-MM-DD".

14.4.2 Data import process

Operations are performed, depending on whether the element type, the column or the column value.

Column Id

You may or may not add an "id" column in the file.

Column "id" exists and "id" is set in a line

- The import will try to update the corresponding element, and will fail if it does not exist.

Column "id" does not exist or if "id" is not set in a line

- The import will create a new element from the data.

Linked tables

For columns corresponding to linked tables ("idXxxx"), you can indicate as the column name either "idXxxx" or "Xxxx" (without "id") or the caption of the column (as displayed on screens).

Numeric value

- If the value of the column is numeric, it is considered as the code of the item.

Non numeric value

- If the value of the column contains non numeric value, it is considered as the name of the item, and the code will be searched for the name.

Columns with no data

- In any case, columns with no data will not be updated.
- Then you can update only one field on an element.

Clear data

- To clear a data, enter the value "NULL" (not case sensitive).

Planning elements

- Insertion into "Planning" elements (activity, project), automatically inserts an element in the table "PlanningElement".
- The data of this table can be inserted into the import file.

14.5 Automatic import

Imports can be automated.

Files placed on a defined directory will automatically be imported.

Note:

- Automatic import parameters must be set in *Global parameters* screen.
- Background task must be started by *Administration console* screen.

The files must respect some basic rules.

File name format

- File name format is : "Class"_"Timestamp"."ext"
- Example of import file name: Ticket_20131231_235959.csv

  Class

  - The type of item to be imported (Ticket, Activity, Question, ...).

  Timestamp

  - Timestamp defined to be able to store several files in the directory.
  - Format is free.
  - The recommended format is "YYYYMMDD_HHMMSS".

  Ext

  - File extension, representing its format.
  - Valid extensions are CSV and XLSX.

File format

- The files must follow the ProjeQtOr *File format*.
- Files must be full and consistent.

  Hint:

  – The files should not be directly created in the import folder.

  – They must be created in a temporary folder and moved afterwards.

Import process

- Correctly imported files are moved to a "done" sub folder of the import folder.
- If an error occurs during import of a file, the full file is moved to "error" sub-folder of the import folder, even if there is only one error over many other items correctly integrated.
- You can get the result as a log file and/or email summary.

CHAPTER 15

Controls & Automation

Contents

- *Workflows*
- *Mails on event*
- *Delays for tickets*
- *Indicators*
- *Predefined notes*
- *Checklists*
- *Receivers list*

15.1 Workflows

Concepts

- *Profiles definition*

A workflow defines the possibility to go from one status to another one, and who (depending on profile) can do this operation for each status.

Once defined, a workflow can be linked to any type of any item.

Section: Description

Field	Description
Id	Unique Id for the workflow.
Name	Name of the workflow.
Sort order	Number to define the order of display in lists.
Closed	Flag to indicate that workflow is archived.
Description	Complete description of the workflow.

*** Required field**

Button: Select status to show or hide

- This button can be used to hide some unnecessary status.

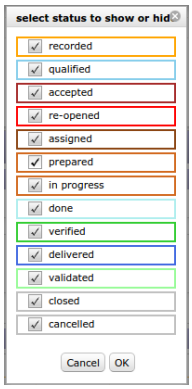

Fig. 15.1: Select status to show or hide dialog box

Section: Workflow Diagram

- The workflow diagram presents a visual representation of the workflow displaying all possible transitions (independently to profile rights).

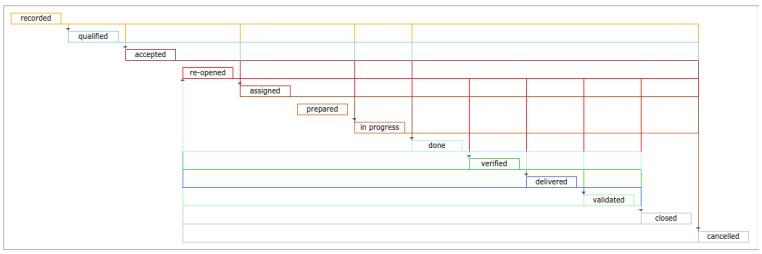

Fig. 15.2: Workflow Diagram

Section: Habilitation to change from a status to another

- The habilitation table helps defining who can move from one status to another one.
- Each line corresponds to the status from which you want to be able to move.
- Each column corresponds to the status to which you want to be able to go.
- It is not possible to go from one status to itself (these cells are blank).
- Just check the profile (or "all") who is allowed to pass from one status to the other.

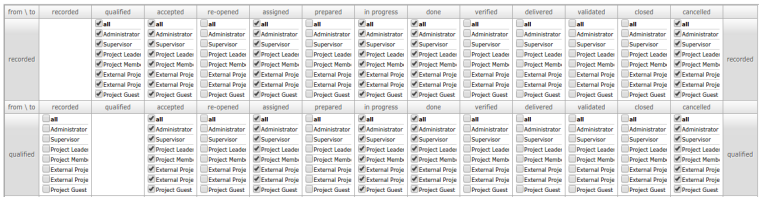

Fig. 15.3: Habilitation table

In the upper example:

- Anyone can move an item from "recorded" to "assigned" and from "recorded" to "cancelled".
- No one can move an item from "qualified" status to any other status. In this case, pay attention that it must never be possible to move an item to "qualified" status, because it will not be possible to leave this status.

15.2 Mails on event

The application is able to automatically send mails on updating event.

Events are defined on an element and element type.

Note:

- The mail message is formatted to display item information.
- Mail titles is defined in *Global parameters* screen.

Section: Description

Field	Description
Id	Unique Id for the event.
Element updated	Type of elements that will be concerned by automatic emailing.
Type	Type of the selected element updated.
New status	Positioning the elements to this status will generate an email.
Or other event	Other event that will possibly generate an email.
Closed	Flag to indicate that status mail is archived.

Field: Type

- If not set, the event is valid for every type of the element.

Section: Mail receivers

- List of addresses of the mails.
- The list is not nominative, but defined as roles on the element.
- Each addressee will receive mail only once, even if a person has several "checked" roles on the element.
- See: *Receivers list* for receivers detail.

15.3 Delays for tickets

It is possible to define a default delay for tickets, for each ticket type and each ticket urgency.

Note:

- On creation, the due date will automatically be calculated as creation date + delay.

Section: Description

Field	Description
Id	Unique Id for the delay definition.
Ticket type	Ticket type the delay applies to.
Urgency	Urgency of ticket the delay applied to.
Value	Value of delay.
Closed	Flag to indicate that delay definition is archived.

*** Required field**

Field: Value

- Unit for the value can be :
  - Days : simple calculation as days.
  - Hours : simple calculation as hours.
  - Open days : calculation excluding days off (weekends and days off defined on "calendar").
  - Open hours : calculation only on the "standard open hours" defined in *Global parameters* screen.

15.4 Indicators

It is possible to define indicators on each type of element.

Depending on type of elements the type of indicators that can be selected in list differs.

Some indicators are based on delay (due date), some on work, some on cost.

For each indicator a warning value and an alert value can be defined.

Section: Description

Field	Description
Id	Unique Id for the indicator definition.
Element	The elements the indicator applies to.
Type	Type of the elements the indicator applies to.
Indicator	Indicator applies to.
Reminder	Delay before due date or % of work or % or cost to send a warning.
Alert	Delay before due date or % of work or % or cost to send an alert.
Closed	Flag to indicate that delay definition is archived.

Section: Mail receivers

- List of addresses of the mails.
- The list is not nominative, but defined as roles on the element.
- Each addressee will receive mail only once, even if a person has several "checked" roles on the element.
- See : *Receivers list* for receivers detail.

Section: Internal alert receivers

- List of addresses of the internal alert.
- The list is not nominative, but defined as roles on the element.
- See : *Receivers list* for receivers detail.

15.5 Predefined notes

The predefined note set the possibility to define some predefined texts for notes.

When some predefined notes are defined for an element and / or type a list will appear on note creation.

Selecting an item in the list will automatically fill in the note text field.

Section: Description

Field	Description
Id	Unique Id for the predefined note.
Name	Name of the predefined note.
Element	Kind of item (Ticket, Activity, ...) for which this predefined note will be proposed on note creation.
Type	Type of element for which this predefined note will be proposed on note creation.
Closed	Flag to indicate that delay definition is archived.
Text	Predefined text for notes.

*** Required field**

Field: Element

- If not set, predefined note is valid for every element type.

Field: Type

- If not set, predefined note is valid for every type of the element.

15.6 Checklists

It is possible to define checklist forms for each type of element.

When a checklist form exists for a given element, the checklist is available for the element.

Section: Description

Field	Description
Id	Unique Id for the checklist definition.
Element	The elements the checklist applies to.
Type	Type of the elements the checklist applies to.
Closed	Flag to indicate that checklist definition is archived.

Section: Checklist lines

A checklist is built from checklist lines.

- Click on ✚ to create a new checklist line.
- Click on to update an existing checklist line.
- Click on ✖ to delete the corresponding checklist line.

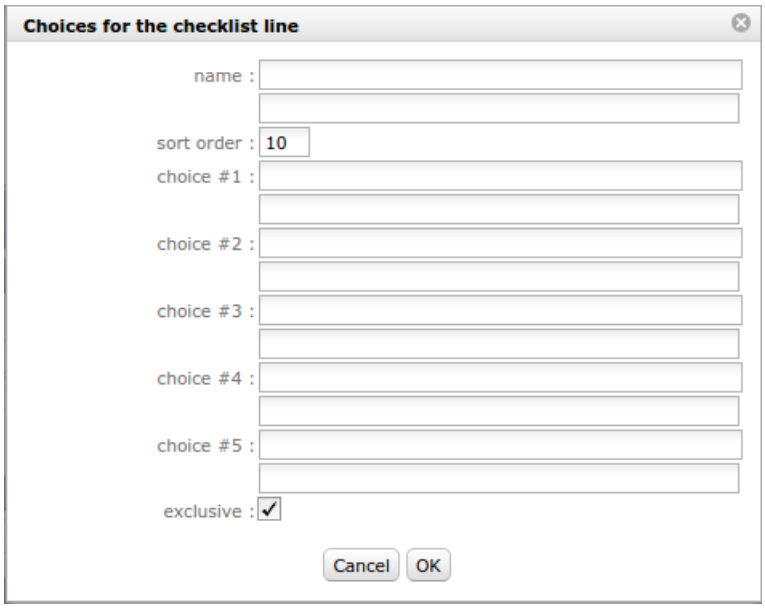

Fig. 15.4: Choices for the checklist lines dialog box

Table 15.1: Choices for the checklist lines dialog box fields

Field	Description
Name	Name of the subject of the checklist line.
Sort order	Order of the line in the list.
Choice #n	Possible choices (checks) for the list (up to 5 choices).
Exclusive	Are the choices exclusive (select one will unselect others).

Details of dialog box

- Each line has a name, an order and up to 5 check choices.
- A line with no check choice will be displayed as a **section title**.
- Name and Choices have 2 fields :
  1. Displayed caption.
  2. Help text that will be displayed as tooltip.
- Checks can be exclusive (select one will unselect others) or not (multi selection is then possible).

15.7 Receivers list

Receivers can receive email and alert.

A description of receivers below.

Requestor

- The contact defined as *requestor* on current item; sometimes appears as "contact" (on quotation and order, for instance) and sometimes have no meaning (for instance for milestone).

Issuer

- The user defined as *Issuer*.

Responsible

- The resource defined as *responsible*.

Project team

- All resources affected to the project.

Project leader

- The resource(s) affected to the project with a "Project Leader" profile.

Project manager

- The resource defined as the manager on a project.

Assigned resource

- All resources assigned.

Other

- Provides an extra field to manually enter email addresses.
- If "other" is checked, an input box is displayed to enter a static mail address list.
- Several addresses can be entered, separated by semicolon.

CHAPTER 16

Access rights

Contents

- *Profiles*
- *Access modes*
- *Access to forms*
- *Access to reports*
- *Access to data (project dependant)*
- *Access to data (not project dependant)*
- *Specific access*
- *Translatable name*

16.1 Profiles

Concepts

- *Profiles definition*

The profile is a group of authorization and access rights to the data.

Each user is linked to a profile to define the data he can see and possibly manage.

Display format

- In the next screens, the name of profiles is displayed in columns.
- Access rights and options are displayed in rows.
- This display format allows to manage easily authorizations for each profile.

Value of Field "Name"

- The value of field "Name" is not the name displayed, but it is a code in the translation table.
- The name displayed at right of the field is the translated name.

- See: *Translatable name*.

New profile

- The value of field “Name” must be a significant name and must not contain spaces or special characters.
- Ideally, the value of the field should start with “profile” (to be easily identified in the translation table).

Section: Description

Field	Description
Id	Unique Id for the profile.
Name	Name of the profile.
Profile code	A code that may be internally used when generating emails and alerts.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate that profile is archived.
Description	Complete description of the profile.

Field: Profile code

- ADM: will designate administrator.
- PL: will designate project leader.

16.2 Access modes

The access mode defines a combination of rights to read, created, update or delete items.

Each access is defined as scope of visible and updatable elements, that can be :

- **No element:** No element is visible and updatable.
- **Own elements:** Only the elements created by the user.
- **Elements he is responsible for:** Only the elements the user is responsible for.
- **Elements of own project:** Only the elements of the projects the user/resource is affected to.
- **All elements on all projects:** All elements, whatever the project.

Value of Field "Name"

- The value of field "Name" is not the name displayed, but it is a code in the translation table.
- The name displayed at right of the field is the translated name.
- See: *Translatable name*.

New access mode

- The value of field "Name" must be a significant name and must not contain spaces or special characters.
- Ideally, the value of the field should start with "accessProfile" (to be easily identified in the translation table).

Section: Description

Field	Description
Id	Unique Id for the access mode.
Name	Name of the access mode.
Read rights	Scope of visible items
Create rights	Scope of possibility to create items.
Update rights	Scope of updatable items.
Delete rights	Scope of deletable items.
Sort order	Number to define order of display in lists
Closed	Flag to indicate that access mode is archived.
Description	Complete description of the access mode.

*** Required field**

16.3 Access to forms

This screen allows to define screen access for each profile.

Users belonging to a profile can see the corresponding screen in the menu.

How to do

- Screens are grouped as seen in the menu.
- Click on checkbox to permit or revoke access to the screen for a profile.

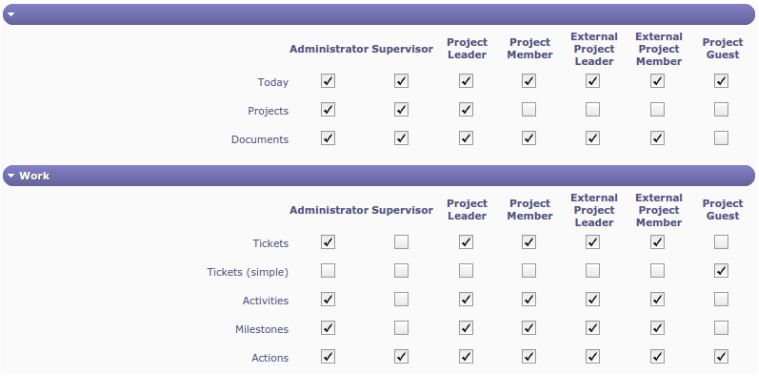

Fig. 16.1: Access to forms screen

16.4 Access to reports

This screen allows to define report access for each profile.

Users belonging to a profile can see the corresponding report in the report list.

How to do

- Reports are grouped by report categories.
- Click on checkbox to permit or revoke access to the report for a profile.

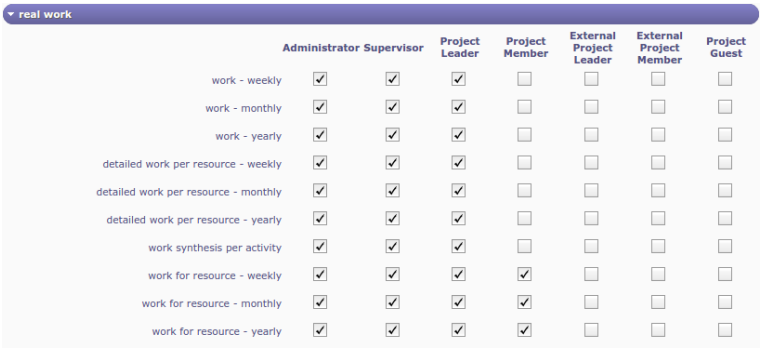

Fig. 16.2: Access to reports screen

16.5 Access to data (project dependant)

This screen allows to set element access mode for each profile.

Allows to define scope of visibility and updating of data in elements for users and resources.

This screen is only for the elements reliant on a project.

How to do

- For each element, selected the access mode granted to a profile.

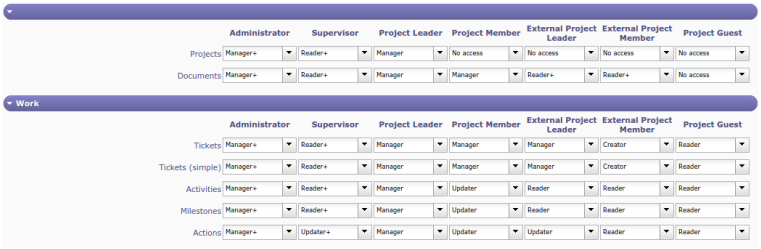

Fig. 16.3: Access to data (Project dependant) screen

16.6 Access to data (not project dependant)

This screen allows to set for each profile, elements access rights.

Allows to grant access rights (read only or write) to users, to data on specific elements.

This screen is only for the elements not reliant on a project.

How to do

- For each element, select the access rights granted to a profile.

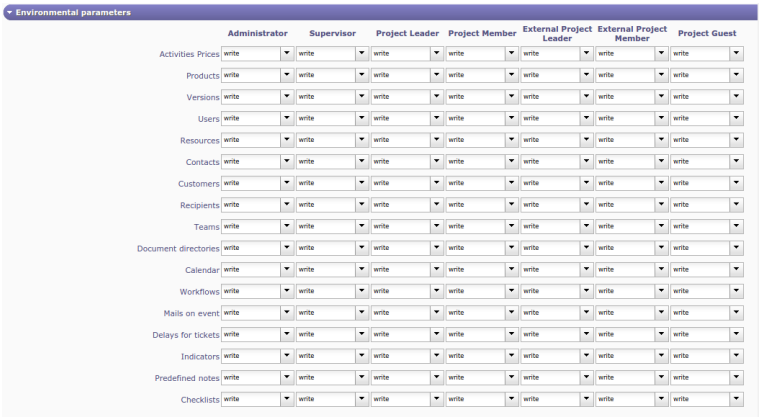

Fig. 16.4: Access to data (Not project dependant) screen

16.7 Specific access

This screen groups specific functionalities options.

Users belonging to a profile can have access to the application specific functions.

Depending on options of functionality, allows to grant access rights, to define data visibility or to enable or disable option.

How to do

- For each option, select the access granted to a profile.

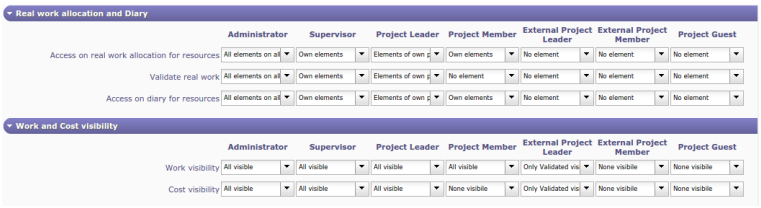

Fig. 16.5: Specific access screen

Section: Real work allocation and Diary

This section allows to:

- Defines who will be able to see and update “real work” for other users.
- Defines who can validate weekly work for resource.
- Defines who have access on diary for resources.

Note: Validate real work

- In most cases, it is devoted to project leader.

Section: Work and Cost visibility

- This section defines for each profile the scope of visibility of work and cost data.

Section: Assignment management

- This section defines the visibility and the possibility to edit assignments (on activities or else).

Section: Display specific buttons

- This section defines whether some button will be displayed or not.

  Display of combo detail button

  - This option defines for each profile whether the button will be displayed or not, facing every combo list box.
  - Through this button, it is possible to select an item and create a new item.
  - This button may also be hidden depending on access rights (if the user has no read access to corresponding elements).

  Access to checklist

  - Defines visibility or not to the checklist (if defined).

Section: Planning access rights

- This section defines access to planning functionality.

  Calculate planning

  - This option defines for each profile the ability to calculate planning or not.

  Access to resource planning of others

  - This option defines for each profile the ability to see the resource planning of others.

Section: Unlock items

- This section defines for each profile the ability to unlock any document or requirement.
- Otherwise, each user can only unlock the documents and requirements locked by himself.

Section: Reports

- This section defines for each profile the ability to change the resource parameter in reports.

Section: Specific update rights

- Defines for each profile the ability to force delete items.
- Defines for each profile the ability to update creation information.

16.8 Translatable name

For profiles and access modes, the value of field “Name” is translatable.

The field “Name” in screens *Profiles* and *Access modes* is not the name displayed, but it is a code in the translation table.

The name displayed at right of the field is the translated name.

The translated name depends on user language selected in *User parameters* screen.

Note:

- If translated name is displayed between [], then the value of field “Name” is not found in the translation table.

Translation table files

- In ProjeQtOr, a translation table file is defined for each available language.
- The files are named “lang.js” and are localized in a directory named with ISO language code.
  - For instance: ../tool/i18n/nls/fr/lang.js.

How to modify the translation file?

- You can edit file “lang.js” to add translation of new value or to modify the existing value translation.
- Or, you can download Excel file named “lang.xls”, available on ProjeQtOr site. You can modify the translation tables of all languages and produce files “lang.js”.

CHAPTER 17

Lists of values

Contents

- *Functions*
- *Status*
- *Quality levels*
- *Health status*
- *Overall progress*
- *Trends*
- *Likelihoods*
- *Criticalities*
- *Severities*
- *Urgencies*
- *Priorities*
- *Risk levels*
- *Feasibilities*
- *Efficiencies*
- *Payment deadlines*
- *Payment methods*
- *Delivery modes*
- *Measure units*

17.1 Functions

The function defines the generic competency of a resource.

Section: Description

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.
Description	Complete description of this value.

*** Required field**

17.2 Status

The status is an important element of items lifecycle.

It defines the progress of the treatment of the element.

Some automations are implemented, depending on status definition, to set on items.

Handled status

- This status specifies that the treatment of item is taken over.
- A *responsible* can be determined.
- It is possible to require the appointment of a responsible when the status change to "handled".

Done status

- This status specifies that the treatment of item is done.
- A *result* can be specify.
- It is possible to require a result when the status change to "done".

Closed status

- This status specifies that the item is closed.
- This item is archived, and it disappeared in the list.
- Item can reappear when "show closed item" is checked.

Cancelled status

- This status specifies that the item is cancelled.

Section: Description

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Handled status	Defines whether 'handled' flag is automatically set for this status.
Done status	Defines whether 'done' flag is automatically set for this status.
Closed status	Defines whether 'closed' flag is automatically set for this status.
Cancelled status	Defines whether 'cancelled' flag is automatically set for this status.
Color	Color to display the status in element lists.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

*** Required field**

17.3 Quality levels

The quality is a manual indicator for the conformity of a project to quality processes.

It defines in a visual way the global conformity of the project.

Section: Description

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Color	Color to display the quality level in element lists and on today screen.
Icon	Icon that can be displayed for this quality level.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

*** Required field**

Field: Icon

- If no icon is defined, color is used.
- You can define your own icons list (see: administration guide).

17.4 Health status

The health status is a manual indicator for the health of a project.

It defines in a visual way the global health of the project.

It is displayed on Today screen, for each project, as a Red / Amber / Green traffic light.

Section: Description

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Color	Color to display the health status in element lists and on today screen.
Icon	Icon that can be displayed for this health status.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

*** Required field**

Field: Icon

- If no icon is defined, color is used.
- You can define your own icons list (see: administration guide).

17.5 Overall progress

The overall progress is a manual indicator for global progress of a project.

It defines in a visual way the global progress of the project, independently from work progress.

It is displayed on Today screen, for each project.

Section: Description

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

*** Required field**

17.6 Trends

The trend is a manual indicator for the global trend of project health.

It defines in a visual way the health trend of the project.

It is displayed on Today screen, for each project.

Section: Description

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Color	Color to display the trend in element lists and on today screen.
Icon	Icon that can be displayed for this trend.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

*** Required field**

Field: Icon

- If no icon is defined, color is used.
- You can define your own icons list (see: administration guide).

17.7 Likelihoods

The likelihood is the probability of a risk or an opportunity to occur.

Section: Description

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Value	Value of likelihood.
% value	Value in percent.
Color	Color to display the likelihood in element lists
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

*** Required field**

Field: % value

- This field is used to calculate a reserve amount according to the likelihood of risk or opportunity.

17.8 Criticalities

The criticality is the importance of an element to its context.

Risk and Opportunity

- The criticality designs the level of impact the risk or opportunity may have to the project.

Ticket

- The criticality is the estimated impact that the subject of the ticket may have for the product.

Section: Description

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Value	Value of criticality.
Color	Color to display the criticality in element lists.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

*** Required field**

17.9 Severities

The severity designs the level of negative or positive impact the risk or opportunity may have for the product.

Section: Description

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Value	Value of severity.
Color	Color to display the severity in element lists.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

*** Required field**

17.10 Urgencies

The ticket urgency is an element given by the requestor to indicate the quickness of treatment needed for the ticket.

Section: Description

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Value	Value of urgency.
Color	Color to display the urgency in element lists.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

*** Required field**

17.11 Priorities

The ticket priority defines the order to treat different tickets.

Section: Description

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Value	Value of priority.
Color	Color to display the priority in element lists.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

*** Required field**

17.12 Risk levels

The risk level measures the technical risk of implementation of a requirement.

Section: Description

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Color	Color to display the risk level in element lists.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

*** Required field**

17.13 Feasibilities

The feasibility defines the first analysis of implementation of a requirement.

Section: Description

Field	Description
Id	Unique Id for this status.
Name	Name of this status.
Color	Color to display the feasibility in element lists.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this status is archived.

*** Required field**

17.14 Efficiencies

The efficiency measures the result of an action.

Section: Description

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Color	Color to display the efficiency in element lists.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

*** Required field**

17.15 Payment deadlines

The payment deadline is stated on the bill.

Section: Description

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Number of days	Delay in payment (in days).
End of month	Flag to indicate that delay for payment is set at the end of month.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

*** Required field**

17.16 Payment methods

The mode of payment.

Section: Description

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

*** Required field**

17.17 Delivery modes

The mode of delivery.

Section: Description

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

*** Required field**

17.18 Measure units

The measure units.

Section: Description

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Plural of name	Plural form of name.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

*** Required field**

CHAPTER 18

Lists of types

Every element is linked to a type, defining some mandatory data or other GUI behavior.

Contents

- *Projects types*
- *Tickets types*
- *Activities types*
- *Milestones types*
- *Quotations types*
- *Orders types*
- *Individual expenses types*
- *Project expenses types*
- *Expenses details types*
- *Bills types*
- *Payments types*
- *Risks types*
- *Opportunities types*
- *Actions types*
- *Issues types*
- *Meetings types*
- *Decisions types*
- *Questions types*
- *Messages types*
- *Documents types*
- *Contexts types*
- *Requirements types*
- *Test cases types*
- *Test sessions types*
- *Customers types*
- *Behavior section*

18.1 Projects types

Project type is a way to define common behavior on group of projects.

Code of the project type

- Some important behavior will depend on code of the project type.

OPE : Operational project

- Most common project to follow activity.

> **Note:** All new types are created with **OPE** code.

ADM : Administrative project

- Type of project to follow non productive work : holidays, sickness, training, ...
- Every resource will be able to enter some real work on such projects, without having to be affected to the project, nor assigned to project activities.
- Assignments to all project task will be automatically created for users to enter real work.

TMP : Template project

- These projects will not be used to follow some work.
- They are just designed to define templates, to be copied as operational projects.
- Any project leader can copy such projects, without having to be affected to them.

Other sections

- *Behavior*

Section: Description

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	*Code of the project type*.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflows*).
Sort order	Number to define order of display in lists.
Billing type	Will define billing behavior (see: *Billing types*).
Closed	Flag to indicate that type is archived.
Description	Description of the type.

*** Required field**

18.2 Tickets types

Ticket type is a way to define common behavior on group of tickets.

Other sections

- *Behavior*

Section: Description

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflows*).
Sort order	Number to define order of display in lists.
Closed	Flag to indicate that type is archived.
Description	Description of the type.

*** Required field**

18.3 Activities types

Activity type is a way to define common behavior on group of activities.

Other sections

- *Behavior*

Section: Description

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflows*).
Sort order	Number to define order of display in lists.
Closed	Flag to indicate that type is archived.
Description	Description of the type.

*** Required field**

18.4 Milestones types

Milestone type is a way to define common behavior on group of milestones.

Other sections

- *Behavior*

Section: Description

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflows*).
Sort order	Number to define order of display in lists.
Closed	Flag to indicate that type is archived.
Description	Description of the type.

*** Required field**

18.5 Quotations types

Quotation type is a way to define the way the concerned activity should be billed.

Other sections

- *Behavior*

Section: Description

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflows*).
Sort order	Number to define order of display in lists.
Closed	Flag to indicate that type is archived.
Description	Description of the type.

*** Required field**

18.6 Orders types

Order type is a way to define the way the activity references by the order will be billed.

Other sections

- *Behavior*

Section: Description

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflows*).
Sort order	Number to define order of display in lists.
Closed	Flag to indicate that type is archived.
Description	Description of the type.

*** Required field**

18.7 Individual expenses types

Individual expense type is a way to define common behavior on group of individual expense.

Other sections

- *Behavior*

Section: Description

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflows*).
Sort order	Number to define order of display in lists.
Closed	Flag to indicate that type is archived.
Description	Description of the type.

*** Required field**

18.8 Project expenses types

Project expense type is a way to define common behavior on group of project expense.

Other sections

- *Behavior*

Section: Description

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflows*).
Sort order	Number to define order of display in lists.
Closed	Flag to indicate that type is archived.
Description	Description of the type.

*** Required field**

18.9 Expenses details types

Expense detail type is a way to define common behavior and calculation mode on group of expense details.

Section: Description

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Sort order	Number to define order of display in lists.
Value / unit	Define calculation mode for the detail type.
Closed	Flag to indicate that type is archived.
Description	Description of the type.

*** Required field**

Field: Value / unit

- If unit is set and not value, this line will be imputable.
- If both unit and value are set, the line will be read only.
- Result cost will be the multiplication between each of the three non empty line values.

Section: Scope

Field	Description
Individual expense	Details type of individual expense.
Project expense	Details type of project expense.

18.10 Bills types

Bill type is a way to define common behavior on group of bills.

Other sections

- *Behavior*

Section: Description

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflows*).
Sort order	Number to define order of display in lists.
Closed	Flag to indicate that type is archived.
Description	Description of the type.

*** Required field**

18.11 Payments types

Payment type is a way to define common behavior on group of payments.

Other sections

- *Behavior*

Section: Description

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflows*).
Sort order	Number to define order of display in lists.
Closed	Flag to indicate that type is archived.
Description	Description of the type.

*** Required field**

18.12 Risks types

Risk type is a way to define common behavior on group of risks.

Other sections

- *Behavior*

Section: Description

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflows*).
Sort order	Number to define order of display in lists.
Closed	Flag to indicate that type is archived.
Description	Description of the type.

*** Required field**

18.13 Opportunities types

Opportunity type is a way to define common behavior on group of opportunities.

Other sections

- *Behavior*

Section: Description

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflows*).
Sort order	Number to define order of display in lists.
Closed	Flag to indicate that type is archived.
Description	Description of the type.

*** Required field**

18.14 Actions types

Action type is a way to define common behavior on group of actions.

Other sections

- *Behavior*

Section: Description

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflows*).
Sort order	Number to define order of display in lists.
Closed	Flag to indicate that type is archived.
Description	Description of the type.

*** Required field**

18.15 Issues types

Issue type is a way to define common behavior on group of issues.

Other sections

- *Behavior*

Section: Description

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflows*).
Sort order	Number to define order of display in lists.
Closed	Flag to indicate that type is archived.
Description	Description of the type.

*** Required field**

18.16 Meetings types

Meeting type is a way to define common behavior on group of meetings.

Note:

- Meeting type is also used for periodic meetings definition.

Other sections

- *Behavior*

Section: Description

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflows*).
Sort order	Number to define order of display in lists.
Closed	Flag to indicate that type is archived.
Description	Description of the type.

*** Required field**

18.17 Decisions types

Decision type is a way to define common behavior on group of decisions.

Other sections

- *Behavior*

Section: Description

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflows*).
Sort order	Number to define order of display in lists.
Closed	Flag to indicate that type is archived.
Description	Description of the type.

*** Required field**

18.18 Questions types

Question type is a way to define common behavior on group of questions.

Other sections

- *Behavior*

Section: Description

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflows*).
Sort order	Number to define order of display in lists.
Closed	Flag to indicate that type is archived.
Description	Description of the type.

*** Required field**

18.19 Messages types

Message type is a way to define common behavior on group of messages (appearing on today screen).

Other sections

- *Behavior*

Section: Description

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Color	Display color for messages of this type.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate that type is archived.
Description	Description of the type.

*** Required field**

18.20 Documents types

Document type is a way to define common behavior on group of documents.

Other sections

- *Behavior*

Section: Description

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflows*).
Sort order	Number to define order of display in lists.
Closed	Flag to indicate that type is archived.
Description	Description of the type.

*** Required field**

18.21 Contexts types

Context type is defining a fixed list of environmental context to describe ticket or test case.

Only three context types exist, corresponding to the three selectable fields.

Note:

- Only the name of the context types can be changed.
- No new context type can be added.
- No context type can be deleted.

Section: Description

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Closed	Flag to indicate that type is archived.
Description	Description of the type.

*** Required field**

18.22 Requirements types

Requirement type is a way to define common behavior on group of requirements.

Other sections

- *Behavior*

Section: Description

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflows*).
Sort order	Number to define order of display in lists.
Closed	Flag to indicate that type is archived.
Description	Description of the type.

*** Required field**

18.23 Test cases types

Test case type is a way to define common behavior on group of test cases.

Other sections

- *Behavior*

Section: Description

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflows*).
Sort order	Number to define order of display in lists.
Closed	Flag to indicate that type is archived.
Description	Description of the type.

*** Required field**

18.24 Test sessions types

Test session type is a way to define common behavior on group of test sessions.

Other sections

- *Behavior*

Section: Description

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflows*).
Sort order	Number to define order of display in lists.
Closed	Flag to indicate that type is archived.
Description	Description of the type.

*** Required field**

18.25 Customers types

Customer type is a way to define different status of customers (prospects or clients).

Other sections

- *Behavior*

Section: Description

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate that type is archived.
Description	Description of the type.

*** Required field**

18.26 Behavior section

- This section is common to several element types.
- Allows to determine some GUI behavior, according to element types.

Note:

- Depending on the element type the following fields can be displayed.

Description or Comments

- This field allows to define that *description* field to this element type is mandatory.

Responsible

- This field allows to define that *responsible* field to this element type is mandatory when the status to treatment of an item is handled.

Result

- This field allows to define that *result* field to this element type is mandatory when the status to treatment of an item is done.

Flag status

- Those fields allow to determine whether flags status are locked or not.
- When a flag status is locked, move to this status through status change.

CHAPTER 19

Plug-ins

19.1 Plug-ins management

Plug-ins allows to add non generic features to ProjeQtOr.

Plug-in deployment

- Plug-in will be deployed during installation.
- The result of deployment will be available in the log file (See: *Administration console*).

Section: Installed plug-ins

This section lists the installed plug-ins.

Table 19.1: Detail of installed plug-ins list

Field	Description
Name	Plug-in name.
Description	Plug-in description.
Version	Plug-in version.
Deployed date	Deployed date.
Deployed on	The version when the module has been installed.
Compatible since	Compatibility version.

Section: Available plug-ins (local)

This section allows to manage local plug-ins.

Available plug-ins list

- The button allows to select plug-in file.
- The file will be uploaded and it will be added in plugin-ins list.

Table 19.2: Detail of available plug-ins list

Field	Description
File	Plug-in file name.
Date	File date.
Size	File size.

Plug-in installation

- Click on to install plug-in.
- Click on to display the description of plug-in.

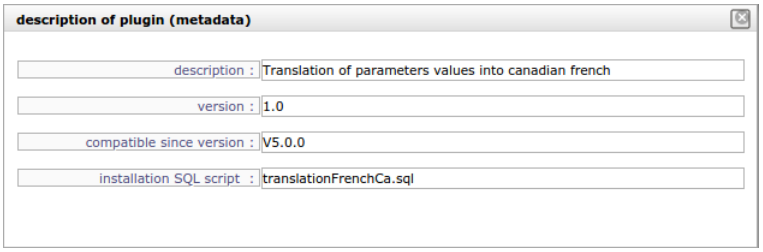

Fig. 19.1: Description plug-in dialog box

Note:

- Plug-in is removed from the list after installation.

Section: Available plug-ins (remote)

This section allows to manage remote plug-ins.

Note:

- This feature will be available later.

CHAPTER 20

Administration

Contents

- *Administration console*
- *Audit connections*
- *Global parameters*
  - *Special fields*

Note:

- The screens described below are restricted to users with administrator profile.
- Users with others profiles can have access whether access rights is granted.

20.1 Administration console

Administration console allows to execute administration tasks on application.

Section: Background tasks

- Allows to start and stop background task is a specific threaded treatment that regularly checks for indicators to generate corresponding alerts, warnings and automatic import when needed.

Section: Send an internal alert

- Allows to send an internal alert to users.

Section: Manage connections

- Allows to force disconnection of active users and close the application for new connections.

  Button: Disconnect all users

  - Allows to disconnect all connected users except your own connection.
  - The application status is displayed below.

Note:

- Disconnection will be effective for each user when his browser will ckeck for alerts to be displayed.
- The delay for the effective disconnection of users will depend on the parameter "delay (in second) to check alerts" in *Global parameters* screen.

Button: Open/Close application

- Allows to open and close application.
- When the application is closed the message below will appear on login screen.

Section: Maintenance of Data

- The administrator has the possibility to:
  - Close and delete sent emails and alerts.
  - Delete history of connections.
  - Updating references for any kind of element.

Section: Log files maintenance

- The administrator has the possibility to:
  - Delete old log files.
  - Show the list and specific log file.

20.2 Audit connections

- Audit connection proposes a view of "who is online".

Note:

- The administrator has the possibility to force the disconnection of any user (except his own current connection), see: *Administration console*.

20.3 Global parameters

Global parameters screen allows configuration of application settings.

Note: Tooltip

- Moving the mouse over the caption of a parameter will display a tooltip with more description about the parameter.

Section: Daily work hours

- Definition of regular "work hours".
- Used to calculate delays based on "open hours".

Section: Units for work

- The parameters to real work allocation and workload.

  Fields: Unit for real work allocation and for all work data

  - Definition of the unit can be in days or hours.

  Note:

  - If both values are different, rounding errors may occur.
  - Remember that data is always stored in days.
  - Duration will always be displayed in days, whatever the workload unit.

  Number of hours per day

  - Allows to set number of hours per day.

  Max days to book work

  - Allows to set a max of days resource can enter real work without receiving an alert.

Section: Planning

- Specific parameters about Gantt planning presentation.

  Show resource in Gantt

  - Select if the resource can be displayed in a Gantt chart, and format for display (name or initials).

  Max projects to display

  - Defines maximum number of projects to display.
  - To avoid performance issues.

  Print Gantt with 'old style' format

  - Propose possibility to display "old style" Gantt.
  - May cause performance issues, but could fix some display issue on browsers.

Consolidate validated work & cost

- Select if validated work & cost are consolidated on top activities and projects :
  - **Never** : Not consolidate
  - **Always** : Values are replaced on activities and project.
  - **Only is set** : Replaces values, only if not already set.

Apply strict mode for dependencies

- Defines if a task can begin the same day as the preceding one.

Section: Real work allocation

- Defines behavior of tasks in the real work allocation screen.

  Display only handled tasks

  - Display only tasks with "handled" status.

  Set to first 'handled' status

  - Change status of the task to the first "handled" status when real work is entered.

  Set to first 'done' status

  - Change status of the task to the first "done" status when no left work remains.

Section: Responsible

- Behavior about management of responsible, including automatic initialization of responsible.

  Auto set responsible if single resource

  - Automatically set responsible if not set and only one resource if affected to the project.

  Auto set responsible if needed

  - Automatically set responsible to current resource if not set and the responsible is required (depending on status).

  Only responsible works on ticket

  - Only responsible can enter some real work on the ticket.

Section: User and password

- Security constraints about users and passwords.

Section: Ldap management parameters

- Information about LDAP connection and behavior on creation of new user from LDAP connection.

Section: Format for reference numbering

- Allows to define reference formats for items of element, documents and bills.

  Reference format for items of element

  -

  Global parameters for reference formatting

  - Prefix : can contain {PROJ} for project code, {TYPE} for type code, {YEAR} for current year and {MONTH} for current month.

  Global parameters for document reference formatting

  - format : can contain {PROJ} for project code, {TYPE} for type code, {NUM} for number as computed for reference, and {NAME} for document name.
  - Suffix : can contain {VERS} for version name.

Section: Localization

- Localization and internationalization (i18n) parameters.

Section: Miscellanous

Miscellaneous parameters :

- Auto check (or not) for existing new version of the tool (only administrator is informed);
- Separator for CSV files (on export and export);
- Memory limit for PDF generation.

Section: Display

- Selection of graphic interface behavior and generic display parameter for users.
- Icon size are default : user can overwrite these values

Section: Files and Directories

Definition of directories and other parameters used for Files management.

> **Warning:** Attachments Directory
> Should be set out of web reach.

> **Warning:** Temporary directory for reports
> Must be kept in web reach.

Section: Document

Definition of directories and other parameters used for Documents management.

Warning: Root directory for documents
Should be set out of web reach.

Section: Management of automated service (CRON)

Parameters for the "Cron" process.

Defined frequency for these automatic functions

- It will manage :
  - Alert generation : Frequency for recalculation of indicators values.
  - Check alert : Frequency for client side browser to check if alert has to be displayed.
  - Import : Automatic import parameters.

Warning: Cron working directory
Should be set out of web reach.

Warning: Directory of automated integration files
Should must be set out of web reach.

Defined parameters for the "Reply to" process

- It will manage connection to IMAP INBOX to retrieve email answers.

Note: Email input check cron delay
- Delay of -1 deactivates this functionality.

Note: IMAP host
- Must be an IMAP connection string.
- Ex: to connect to GMAIL input box, host must be: {imap.gmail.com:993/imap/ssl}INBOX

Automatic import

Field: Automatic import cron delay

-

Field: Directory of automated integration files

-

Field: Log destination

-

Field: Mailing list for logs

-

Section: Emailing

Parameters to allow the application to send emails.

Section: Mail titles

- Parameters to define title of email depending on event (1).

(see: *Special fields*)

20.3.1 Special fields

Special fields can be used in the title and body mail to be replaced by item values :

- ${dbName} : the display name of the instance
- ${id} : id of the item
- ${item} : the class of the item (for instance “Ticket”)
- ${name} : name of the item
- ${status} : the current status of the item
- ${project} : the name of the project of the item
- ${type} : the type of the item
- ${reference} : the reference of the item
- ${externalReference} : the *external reference* of the item
- ${issuer} : the name of the issuer of the item
- ${responsible} : the name of the responsible for the item
- ${sender} : the name of the sender of email
- ${sponsor} : the name of the project sponsor
- ${projectCode} : the project code
- ${contractCode} : the contact code of project
- ${customer} : Customer of project
- ${url} : the URL for direct access to the item
- ${login} the user name
- ${password} the user password
- ${adminMail} the email of administrator

CHAPTER 21

Glossary

21.1 Glossary

Closed

- Flag to indicate that item is archived.
- Item will not appear in lists any more, unless "show closed" is checked.

Description

- This field allows to define a description on an item.
- Depending on the element type, name of field can be different.

See also:

GUI behavior

- It is possible to define that description field is mandatory.
- The element type screens allow to set this parameter to several elements.
- More detail, see: *Behavior section*.

Done

- Flag to indicate that item has been done.
- Date of done is saved.

External reference

- This field allows fill free input.
- It uses to refer information from an external source.
- External reference value can be put in email message with **externalReference** special field.
- More detail, see: **Administration guide**.

Handled

- Flag to indicate that item has been taken into account.
- Date of handling is saved.
- This generally means that responsible has been named.

Id

- Every item has a unique Id, automatically generated on creation.
- Id is chronologically affected, for all kind of items (Activity, Ticket).
- Id is shared for all projects and all types (i.e. incident) of the same kind items (i.e. Ticket).
- **Reference** is displayed after id, automatically generated on creation.
- Reference depends on defined format, see under "Format for reference numbering" section in *Global parameters* screen.
- Default format defines an numbering specific for each project and each type of items.

Origin

- Determines the element of origin.
- The origin is used to keep track of events (ex.: order from quote, action from meeting).
- More detail, see : *Origin field*.

Status

- The status determines the life cycle of items.
- It defines the progress of the treatment of the item.
- Item is linked to a element type, element type is linked to a workflow.
- A workflow defines the possibility to go from one status to another one, more detail, see: *Workflows*.

See also:

Accelerator button

- This button allows to skip to the next status.
- More detail, see: *Move to next status button*.

Planning priority

- This priority allows to define planned order among planning element.
- The smaller priority element is planned first.
- The default priority is 500 (medium).
- If projects have different priorities, all elements of project with smaller value priority are planned first.

Result

- A result is a description of the treatment of an item.
- Usually, the result is set when the status of the item is *done*.

See also:

GUI behavior

- It is possible to define that result field is mandatory on done status.
- The element type screens allow to set this parameter to several elements.
- More detail, see: *Behavior section*.

WBS

- Work Breakdown Structure.
- Hierarchical position of the element in the global planning.